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ABSTRACT

Outcomes of Tennessee's Career Ladder Program are presented in this report, with a focus on the early implementation stage and perceptions of teachers and administrators. Methodology involved two sets of interviews with participating teachers and administrators from 18 schools and a statewide survey of 1,039 out of 2,105 faculty from 54 schools. Following an overview of the study, the second chapter describes the events and outcomes of the legislative process that created the program. Chapters 3 and 4 present interview and survey findings, which indicate concerns with the state/school district relationship, fast-tracking practices, and the statewide evaluation process. An overview of career ladder legislation in the 1985 Tennessee General Assembly is provided in the fifth chapter. The program's status, role of working conditions, and issues in evaluation, policy, and management are discussed in the final chapter. Twenty-nine tables are included. Appendices contain program updates, a program overview, a summary of 1984 special session events, highlights of state action, a list of 18 districts, and statewide program results. (58 references) (LMI)

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Shaping Tennessee's Career Ladder Program--1985

Part 2: Improving Teacher Quality Through Incentives Project

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Submitted by
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The University of Tennessee
Knoxville
Summer, 1985

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THROUGH INCENTIVES PROJECT

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Preface

Documentation and supporting materials for a report of this magnitude are necessarily voluminous. Part I of this report, Shaping Tennessee's Master Teacher Program--1983, contains many of the materials that will help to clarify for the reader the origin of the Tennessee Career Ladder Program and the process through which teachers, legislators, education organizations and others went to arrive at the present status of the program. In several instances, the reader's attention is referred to material in this first report.

Part II of the report Shaping Tennessee's Career Ladder Program--1985, puts into perspective how teachers and administrators have reacted to the program during its first year of implementation. The appendixes of this report contain material that will help bring the reader up to date on activities in this state and others concerning various aspects of the Career Ladder Program, as well as supportive materials for specific sections of the report.

CHAPTER I

Overview

Purpose

Recent educational reforms at the state level have moved Tennessee into national prominence. The state ranked first (with Florida) in a tabulation based on numbers of educational changes reported to the U.S. Department of Education for its May, 1984 report (State Policy Reports, 1984). Among the new programs gaining particular attention in the state's Career Ladder Program, Tennessee's Career Ladder for teachers and administrators evolved from a Master Teacher plan proposed by Governor Lamar Alexander early in 1983. The concept he proposed has been described as "nothing short of radical" and politically risky (Aldrich, 1984, p. 47). With passage of the Comprehensive Education Reform Act of 1984. Tennessee moved beyond the controversial and difficult pre-passage phase to begin the arduous task of putting into place the Career Ladder Program and other enacted reforms (Handler & Carlson, 1984).

The project being reported in this document has been funded by a U.S. Department of Education grant under the Secretary's Discretionary Fund. One purpose of the project is to conduct a case study of Tennessee's Career Ladder Program. Emphasis is being placed on the Career Teacher component of the Comprehensive Education Reform Act of 1984, referred to prior to passage as the Master Teacher Program. Key issues and responses

to these issues during the planning and early implementation phases have been identified. A set of general recommendations is proposed to assist states or localities anticipating or engaged in comparable merit pay or career ladder programs.

Objectives of the project, leading to a set of recommendations based on the Tennessee experience are to:

1. Determine the processes used to establish policies and practices for the Career Teacher Program.
2. Identify key problems and issues arising in relation to the program.
3. Analyze the strategies used to deal with problems or issues affecting the Career Teacher program.
4. Examine the early phases of program implementation in relation to intents.
5. Determine the kinds of research and assistance used by state decision makers involved with the program.
6. Respond through a direct technical assistance component to selected information needs at the state level.

Scope of the Study

The project funding period extends from October, 1983 through March, 1985, with an extension applied for through June, 1985. In October, 1983, the ongoing activities in the state focused on final preparation and legislative passage of the Comprehensive Education Reform Act of 1984. Enactment of the legislation did not occur until late February, 1984, with implementation beginning in the 1984-85 school year.

Due to the timing of the funding period, events and issues prior to late Fall, 1983 have been reconstructed and analyzed

from interviews, reports, minutes, media accounts, and available documents. Since that time, these data sources have been supplemented by attendance at key meetings, monitoring of legislative sessions, and other activities. The focus of data collection has been the teacher portion of the Career Ladder Program, although a comparable set of regulations has been instituted for administrators.

Project Design

Analysis of Tennessee's Career Teacher Program is being conducted as a dynamic case study. Case studies are valuable because they help others learn from the experiences of particular groups or individuals. The case study has both an awareness role, bringing new developments to the attention of interested parties and an important instructive role, pointing out strong points worth emulating and pitfalls to avoid. The study design permits responsive coverage of emerging events to keep up with changes occurring during development of the Tennessee program. Specific questions have been generated to gather information from key individuals representing groups involved or affected by the Career Ladder Program.

The study is being conducted in three phases:

1. the developmental period from inception of the basic framework for the program to the proposal of the Comprehensive Educational Reform Act at the close of 1983.

2. the period covering passage of the bill during the Special Legislative Session and leading up to the start of implementation in the Fall of 1984.

3. the initial phase of implementation beginning in Fall, 1984 and extending through the end of the grant period (March, 1985).

The research is being conducted by Dr. Janet R. Handler and Dr. Deborah L. Carlson of the University of Tennessee, Knoxville. A three-member Management Team provides regular feedback about the project. The team members are Dr. Alanson Van Fleet, University of Tennessee, Dr. George Malo, State Department of Education; and Dr. John Folger, Vanderbilt Institute for Public Policy Studies. A liaison function with the legislature and other groups in Nashville was fullfilled during the first phase by Dr. Karen Weeks, Vanderbilt University, and during the 1985 Session by Dr. Rose Miller, legislative intern. The project's administrative assistant, Vivian Ross, is based at the University of Tennessee, Knoxville.

Data collection and analysis have included both formal and informal techniques. Information was compiled through interviews, content anlaysis of selected documents, transcriptions and analysis of meetings, informal conversations, survey instruments, and monitoring of key committee hearings. Representatives of numerous groups were interviewed, including persons at: the State Department of Education, the Interim Certification Commission, the State Board of Education, Governor Alexander's office the Tennessee Education Association, the Teachers' Study Council, and the Legislative Oversight Committee. Four school systems participated in a series of case study activities to portray

the Career Ladder Program as implemented in a diverse group of educational settings in the state.

Implications

This project has several important implications for the improvement of career ladders and related programs in Tennessee and other states. The case study has resulted in recommendations based upon the factors that have contributed to success and those which have acted as obstacles in this state. The project has shed light on issues which became controversial and steps that were taken to deal with emerging concerns. Taken collectively, the recommendations represent a model of state level implementation of a career ladder for teachers.

The guidelines will aid in decision making in Tennessee as the program is refined in the coming years. This program will for some time be flexible enough to benefit from information about more productive strategies.

The study will also be of immediate value to decision makers in other states currently considering or implementing similar programs. While their specific structures and political influences may vary, the generic issues and concerns will be of common interest. Contacts are being established in a number of key states to facilitate a type of mutual support process through the exchange of ideas and developments. It is expected, too, that this project will reveal numerous important avenues for further investigation. This particular educational reform is

both broad in scope and high in interest nationwide. A case study of this type is an appropriate mechanism for identifying specific areas that warrant additional study.

Report Organization

The present report represents the culmination of a portrayal begun in Part 1: Shaping Tennessee's Career Ladder Program - 1983. That initial project report is a comprehensive treatment of the inception and development of Tennessee's Career Ladder Program (originally referred to as the Master Teacher Plan). It includes chapters on the early versions of this controversial program, the legislative process involving a delay in passage until the following session, and the diverse groups that played key roles in shaping the final product. Issues that assumed importance during the developmental period are discussed in the report. An extensive set of Appendixes provides illustrative material and offers a guide to additional resources. An abridged treatment of this early phase of the Tennessee Career Ladder Program is also available, entitled Shaping Tennessee's Career Ladder Program: Part 1 Overview.

The Part 2 report begins with the period during which the Career Ladder Program became law, as part of the Comprehensive Education Reform Act of 1984. The Act also includes such measures as a computer literacy program for grades 7-8 and a Centers of Excellence program for higher education. In subsequent chapters, the report treats the initial activities and reactions associated

with preparing to put the Career Ladder into operation statewide. Results of a set of field-based case studies in varied school districts are also presented. The report concludes with a discussion of issues and recommendations based upon the analysis of the initial Tennessee experiences with a Career Ladder Program.

CHAPTER II

Passage of the Career Ladder Program

In this chapter, the events and outcome of the legislative process that yielded a Career Ladder Program for Tennessee are discussed. As 1983 ended, the proposed program was "on hold" following actions by the legislature earlier that year to defer the Governor's education reform bill for further study. The developments leading to that year long postponment are presented and analyzed in the companion volume to this report; Part I: Shaping Tennessee's Career Ladder Program (Handler & Carlson, 1984). The first report provides detailed information about the efforts by Governor Alexander to gain acceptance for his education package, and the positive and negative reactions which occurred in various sectors. Strong teacher association opposition to provisions of the Career Ladder (earlier called Master Teacher) plan was influential in delaying the program. Yet, work continued on the evaluation system that would be used and the education reform bill remained a high priority of the Governor for passage in 1984.

The following section contains a brief portrayal of the Career Ladder proposal's status nearly one year after first being presented to the public on January 18, 1983. Subsequent sections analyze the Extraordinary Session (Special Session) of the legislature from which a career ladder plan successfully emerged and provided an overview of the program enacted by Tennessee's legislature in February, 1984.

Status of the Program--December, 1983

The Career Ladder Program has been through a series of changes from the original form in which Governor Alexander first proposed his Master Teacher Plan (Handler & Carlson, 1984). As 1983 drew to a close, interest in the education reform bill was still high. A Select Committee on Education, comprised of 14 senators and representatives, had heard testimony and held numerous meetings to reach agreement on a bill that they could propose to the legislature when the education issue came up for further consideration early in 1984. The Select Committee on Education had been appointed following the vote to defer the controversial measure for further study. This group made some important changes in the Governor's proposal for creating a merit pay type of system for teachers and administrators. Emphasis was placed on giving more varied professional responsibilities to those at higher career levels. The number and designation of the career levels was changed. Access to the higher career levels was opened to all who qualified, and current teachers were given the option of whether or not to participate.

Interpretations of the proposal that emerged from the Select Committee on Education late in 1983 varied. Some said TEA had lost out on many of its key program features (Knoxville News-Sentinel, November 25, 1983). Others viewed the Governor as having sacrificed more of the key features in his program (Washington Monthly June, 1984). Concerns were expressed by teachers

about such features as the proposed use of the National Teacher Exam (NTE), the failure to provide for more than a 10% pay raise across the board, and the number of years (12) it took to reach the top level.

As the 1984 legislative session approached, then, there were two major needs to be addressed: determining the specific nature of the educational reform measure to be enacted (few doubted that an education program would emerge) and arriving at a workable way to finance it. The lengthy period of highly publicized controversy had made the entire education issue quite emotional among those who were following or involved in these developments.

The Special Session

Governor Alexander chose an unexpected means of focusing the attention of legislators and the public even more explicitly on education reform. In December, 1983 he announced that a 30-day Special Session of the State legislature would be convened on January 10, 1984, the day would have marked the opening of the regular session. This dramatic step marked the first time since 1966 that a Tennessee governor had called such a session. In an official debate to education reform (significantly, not just a single proposal) and to tax measures (except legalized gambling) needed to fund the enacted changes. A bill proposing a restructuring of the governance structure for education was also to be discussed, as well as a state employee salary hike.

The Special Session announcement brought reactions of both

support and condemnation, with legislative opponents calling it a power play (Nashville Tennessean, December 26, 1983) and a plot to raise taxes (U.T. Daily Beacon, January 6, 1984). The idea of handling education reform in a special session was not original, since Florida, Mississippi, and Arkansas had done so previously.

Legislative leaders made early predictions of a short session lasting two to three weeks. Some people were concerned about expenses. Twenty-thousand per day was reported as a cost estimate for convening at the General Assembly (Knoxville News-Sentinel, January 6, 1984).

At the time the Special Session was proposed, support in the Senate favored the governor's program, Comprehensive Education Reform Act of 1984 (CERA). The House was expected to be actively opposed to the measure, based upon prior alignments. However, four days before the session, Senate Majority Leader Milton Hamilton made a proposal to change the committee structure in the Senate for this session so that every senator could serve on one of the two operative committees, Education and Finance. With the subsequent adoption of this proposal the committee size rose from 9 to 17, with Lieutenant Governor Wilder serving on both committees. Under the previous arrangement, five of the nine members of each committee had been sponsors of the administration's bill, so the move was one which could have important implications for the future of the program.

In another key development shortly before the session, House Speaker Ned McWherter suggested a number of amendments to the CERA.

His power and influence in the General Assembly ensured that his extensive set of proposed changes (a 42-page document that became known, due to his constituency's location, as the Weakly County Amendments). Among his proposals were: three bonus-pay stages to be called Career I, II, and III; allowing local systems to evaluate those at the first level (with state veto power over decisions) establishing an alternative to the National Teachers' Examination for entering Career Level I; and extending to 10 years (from 5 under CERA) the recertification period for teachers with Masters (or higher) degrees in their subject areas.

As the Special Session got underway, Governor Alexander made a televised speech in which he restated his arguments in support of a major educational reform program to benefit students, and ultimately every citizen, in the state. A polished graphic presentation accompanied the speech, in a further effort to direct public attention to education issues and, in particular, to the Governor's ideas for improvement.

The Special Session's debates and actions are presented in a detailed timeline in the Appendix to this report. The remainder of this section will provide a more general overview of key events.

In the first few weeks, appointments to the Senate committees were finalized. The appointments appeared to preserve at least a "better than even" chance of passage for the CERA (Knoxville News-Sentinel, January 16, 1984). As various measures were discussed, concerns were expressed about the danger of adding potentially destructive amendments without realizing their impact

(Nashville Banner, January 12, 1984), and about the political deals that were felt to be in the making (The Tennessean, January 16, 1984).

Senator John Bragg (chairman of the Finance Committee) announced a proposal to institute a fiscal oversight committee for the education program. At about the same time, discussion of McWherter's Weakley County Amendments and of TEA's proposals brought the issue of local versus state control to the fore. Class size reduction, too, began to receive more attention as an important measure for school improvement. Although not specifically a Career Ladder provision, it was subsequently addressed in the reform bill.

A number of amendments were submitted in late January on behalf of TEA interests. These focused on increasing the local role in evaluative decision making at the lower career levels and establishing a "grandfather clause" to enable those currently teaching to enter the career ladder automatically. Among other proposals submitted for consideration as January ended were: reducing the early career ladder bonus to enable larger across the board raises, creating a $500 incentive pay provision for beginning teachers, and expanding the fast-track options for career ladder entry to include staff development.

As February began, attention turned to the financing of the education reform measure. Intense wrangling over both the bill and the financial package, particularly a controversial amusement tax, took place over the next two weeks. The CERA passed in the Senate on February 9, and in the House on the 15th. By February

22, the tax bill had also been agreed upon and both measures secured approval awaiting the signature of a Governor who had over a year earlier made the original Master Teacher Plan the focus of statewide and (national) discussion and debate.

In analyzing the 1984 Special Session, it is of interest to note some of the questions and concerns that were raised relative to establishing a career ladder program. While the specific political processes would be expected to differ in other settings, the types of things that were of interest to key individuals or groups may be representative of issues that will surface in any such debate. Among the pertinent questions and issues that could be observed during the Tennessee legislature's deliberations were:

1. What is the better way to improve educational outcomes: pay raises for all teachers or for some (meritorious) teachers? Which approach could help attract better teachers?

2. What is the proper relationship between state and local school systems evaluation processes? Which should have priority in certification and other decisions?

3. Should evaluation be required of all teachers? Should career ladder participation be required?

4. What is the appropriate role of written tests in assessing teaching performance, particularly at the higher career levels?

5. What is the appropriate number of years before a teacher can reach the top of a career ladder? Is there a relationship between years on the job and performance effectiveness?

6. What should be the role of higher education in teacher evaluation? How can the performance of beginning teachers be improved at the preservice level?

7. What steps can or should be taken to see whether a career ladder plan is affecting teaching quality?

8. How much emphasis is being placed on improving instruction versus singly evaluating it?

9. To what extent must the overall working conditions of teachers be improved before the career ladder program can be effective? How much is class size a contributing factor in teacher performance and motivation?

10. What is the likelihood that "make work" jobs will be created for teachers who elect to work on an extended contract basis?

11. What is the appropriate legislative role in future oversight of the education program?

12. What type of governance structure at the state level is most appropriate for carrying out the Career Ladder Program and other reforms?

13. What steps can or should be taken to help assure a more balanced distribution of higher career level teachers across school districts (even those with financial support for education)?

14. Should a specific type of process be required of all teachers, regardless of career ladder participation?

15. To what degree should evaluation practices be affected by professional negotiations at the local level?

16. How much time should be allotted to developing and testing the Career Ladder program before implementation? How quickly should implementation proceed?

In subsequent chapters of this report, these and other issues will be revisited in relation to various aspects of implementation of the enacted legislation. They will also be reconsidered in the presentation of the fianal recommendations from the study.

CHAPTER III

Interviews in Field-Site Schools

Introduction

The second pahse of the project, studying Tennessee's Career Ladder, focused on the implementation of the teacher component of the program. This phase was conducted as a case study which encompassed the period of time beginning with the commencement of school is September 1984, and continued through the end of the school year, June 1985. A major part of this case study involved spending time in schools throughout the state interviewing teachers and principals to determine their perceptions of the program in its first year of implementation. The purpose of the interviews was to collect data pertaining to: (1) the type of information sent and when and how it was received by teachers; (2) attitudes toward various components of the program: (3) choice of Career Ladder options; (4) views on the tests being given--National Teachers Exam (NTE) Core Battery, NTE Specialty Area, and the Career Ladder Test; and, (5) recommendations and concerns. Results of this interview data along with the design of the school study itself are the focus of this chapter.

Schools selected for the case study were characteristically diverse. They ranged from small rural to medium suburban to large city school systems. The six school districts used in the study are located in three divisions of the state: East, Middle, and West Tennessee. Schools within the district were chosen to represent faculty and administration at the elementary school, middle/junior

high school, and high school levels.

Through the identification of teachers' and administrators' perceptions, needs, concerns and questions concerning the Career Ladder, the process of implementation was studied and analyzed. Based on this data and other data from the case study, a set of recommendations has been developed for the purpose of assisting other systems and states in their endeavors to implement similar type programs.

Purpose

This case study was conducted to portray and analyze the early stages of implementation of Tennessee's Career Ladder Program. Though the program will not be fully implemented for three years (1986-1987), a major purpose of this study was to identify the early perceptions, concerns and questions of those involved with the program which may affect the long-range success of the Career Ladder Program. During the past year the progress of the program was monitored to track the change process. By following up on interview data at different periods in the year, changes in attitudes and perceptions were noted.

The case study was designed to address several purposes. Although data was collected from teachers and administrators, the study focused similarly on the teacher component of the program. The study purposes are: (1) To portray and analyze the first year of implementation of the Career Teacher Program; (2) To identify aspects of the program that will have impact on future directions

of the Career Ladder; (3) To identify teacher perceptions of the various components of the program (incoming information, evaluation, staff development, testing, etc.); (4) To determine how, if at all, the collected data varies between the four school districts used in the study; (5) To identify adminstrative perceptions of implementation of teacher Career Ladder; and, (6) To develop a set of recommendations based on data collection in Tennessee which will assist other systems in avoiding this state's pitfalls and help them capitalize on its successes.

Research Questions

The following research questions formed the basis of the interviews conducted throughout the year. Through data collection (interviews, phone calls, correspondence), these questions have been addressed and will be discussed later in the chapter.

1. How have teachers responded to the issues involved with planning and implementing a statewide program (i.e., evaluation, staff development, fast-track process, communication)?

2. How have teachers responded to the components involved in the design and implementation of the Career Ladder Program (i.e., evaluation, testing, staff development, fast-track process)?

3. Are the experiences and attitudes of teachers concerning implementation of the Career Ladder Program comparable across schools in the state?

4. How do experiences and attitudes of teachers differ across the school systems as characterized by ther demographic features (large city, small city, suburban, town, rural)?

5. How do the experiences and attitudes of teachers differ across grade levels taught (i.e., elementary, middle/junior high, high school)?

Sample Selection

The study sample included representation across a diverse set of descriptive characteristics The characteristics included: description of school location (large city, small city, suburban, town, rural); and system-wide choices on career options (local evaluation; state evaluation model; or staff development). Six school districts were randomly selected and subsequently identified as District I, District II, District III, District IV, District V, and District VI. Features of each district are presented in Tables 1-6. Elementary, middle/junior high, and high school levels were represented in each district.

School profiles included the following categories: (1) Student Enrollemnt; (2) Size of Faculty; (3) Caucasian/Black/Other Student Ratio; (4) Description of School Location--Large City, Small City, Suburban, Town, Rural; and, (5) Percentage of Low Income Families--based on free and reduced lunches. Information for categories 1-4 was provided by the school systems. The State Department of Education provided information for category 5.

In the six charts that follow (illustrating the demographics of the school systems used in this study) the asterisk denotes district choices concerning staff development and evaluation. In preparation for implementation of the Career Ladder, each district was required to prepare a staff development component for teachers comparable to the state adopted model (TIM).

Each district was also held accountable for developing a teacher

evaluation model which met state guidelines. Instead of developing its own staff development and evaluation components, districts could adopt the state model of each. If a school system chose to use its own model, the model had to be approved by the State Board of Education. If a system chose the state model, staff from the State Department were responsible for providing materials and assistance in training for implementation of the model. It is possible to use a combination of local evaluation and the state adopted staff development components, and vise-versa.

Four schools were studied in District I: two elementary schools, a middle school, and a high school. The schools in District I were identified as being large city with predominately Caucasian student populations and a small percentage of low income families. District I chose to use the state adopted staff development model and a locally developed evaluation system (see Table 1).

Three schools were studied in District II: an elementary school, a middle school, and a high school. The schools in this district were identified as small city with a predominately Caucasian student population and varying levels of low income families in each of the three schools. District II chose to use its own staff development program and a locally developed evaluation system (see Table 2).

Four schools were studied in District III: two elementary schools, a junior high school, and a high school. The schools in this district were identified as small city with a predominately Black student population and a large percentage of low income

Table 1

School District I Demographic Data**

	[1]Elementary School	[2]Elementary School	Middle School	High School
Student Enrollment	638	396	844	1293
Size of Faculty	36	16	41	55
Caucasian/	91%	97%	94%	96%
Black/	5%	2%	5%	4%
Other	4%	1%	1%	0
School Location	Large City	Large City	Large City	Large City
% Low Income	21.65%	No Data	10.77%	No Data

**Career Ladder Options: Local Evaluation Component

Table 2

School District II Demographic Data

	Elementary School	Middle School	High School
Student Enrollment	422	585	1750
Size of Faculty	29	40	110
Caucasian/	91%	99.6%	94%
Black/	8%	02%	4%
Other	0	.02%	1%
School Location	Small City	Small City	Small City
% Low Income	38.20%	18.10%	12.51%

*Career Ladder Options: Local Staff Development Component

**Career Ladder Options: Local Evaluation Component

families in the elementary schools and junior high school. Approximately one-fourth of the high school student population came from low income families. District III chose both the state adopted staff development and evaluation components (see Table 3).

Three schools were studied in District IV: an elementary school, a middle school, and a high school. The schools in this district were identified as rural with predominately Caucasian student population and varying levels of low income families from school to school. Slightly less than half of the elementary school student population came from low income families. Approximately one-fifth of the high school student population came from low income families. District IV chose both the state adopted staff development and evaluation components (see Table 4).

Two schools were studied in District V: an elementary/middle school combination and a high school. The schools were identified as town with a predominately Caucasian student population and a percentage of low income families ranging from slightly more than one-third of the student population at the elementary and middle school level to slightly more than one-fifth of the student population at the high school level. District V chose both the state adopted staff development and evaluation components (see Table 5).

Two schools were studied in District VI: an elementary/middle school combination, and a high school. The schools were identified as rural with a predominately Caucasian student population and

Table 3

School District III Demographic Data

	[1]Elementary School	[2]Elementary School	Middle School	High School
Student Enrollment	312	335	379	800
Size of Faculty	16	18	26	51
Caucasian/	15%	18%	51.5%	10%
Black/	85%	49%	48.5%	89%
Other	0	0	0	1%
School Location	Small City	Small City	Small City	Small City
% Low Income	89.72%	76.48%	83.01%	24.45%

Table 4

School District IV Demographic Data

	Elementary School	Middle School	High School
Student Enrollment	340	730	1066
Size of Faculty	15	35	61
Caucasian/	99.1%	99%	98.5%
Black/	.3%	1%	1.5%
Other	.6%	0	0
School Location	Rural	Rural	Rural
% Low Income	41.84%	53.37%	22.61%

Table 5

School District V Demographic Data

	Elementary-Middle School	High School
Student Enrollment	700	606
Size of Faculty	35	34
Caucasian/	87%	93%
Black/	13%	7%
Other	0	0
School Location	Town	Town
% Low Income	38.38%	22.67%

varying levels of low income families ranging from a little less than one-third of the student population at the elementary and middle school levels to slightly more than one-sixth of the student population at the high school level. District VI chose both the state adopted staff development and evaluation components (see Table 6).

Procedure

In preparation for the interview process the researchers contacted those in authority in each school district. They: (1) received permission from the Superintendent for an on-site visit; (2) sent pertinent information about the study to each principal recommended by the Superintendent; (3) received permission from the principal to conduct the interviews; and, (4) arranged school visits to interview teachers at times when a representative sample of teachers in each school would be available to interview.

Interviews were scheduled in all six districts at two different times in the year--fall and spring. Between these two periods, follow up letters were sent to all teachers interviewed and phone calls were made to 30% of the teachers in an effort to track the change process.

As stated earlier in this chapter, one of the objectives of this study was to document the change process over the first year of implementation of the Career Ladder. By monitoring this process at several intervals throughout the year, it was possible to identify how various factors affected teachers' perceptions as the factors

Table 6

School District VI Demographic Data

	Elementary-Middle School	High School
Student Enrollment	700	526
Size of Faculty	19	30
Caucasian/	98%	99%
Black/	2%	1%
Other	0	0
School Location	Rural	Rural
% Low Income	29.61%	16.02%

were introduced in the program. For example: Teachers were faced in the summer of 1984 with selecting a fast-track method of entering the Career Ladder (staff development, local evaluation, NTE Core Battery, NTE Specialty, Career Ladder Test). The fast-tracking entry method was a one-time option (Teachers could only fast-track onto the Career Ladder in 1985. After this time they had to go through the full evaluation process.) an important part of the study was to document how teachers perceived this entry mode as they were going through the process. Teachers were asked about their perceptions concerning both their choices for fast-tracking and their reaction to the concept underlying this process.

Another example indicates the value of conducting interveiws twice during the year: The state-adopted staff development model (TIM) was arranged to fit as one of the fast-track methods of entry onto the ladder. It was also available to other teachers or administrators who wanted to benefit from the material. Although every district received the same TIM materials, the method of teaching these materials, the persons who did the teaching, and the time frame for completing the 40-hour module varied from district to district. Consequently, teachers in one district may have completed TIM before November 1984 and others not until February 1985. Some may have paid money to take it, spent their weekends in training, and were taught by a principal who was doing it without supplemental pay. Others may have been paid to take the module and were taught by a supervisor who was being paid to teach the sessions after school. Perceptions of teachers concerning when

they attended TIM sessions, over what period of time, who they were taught by, and how they thought the materials were going to be used in other facets of the Career Ladder Program changed over the period of the first year of implementation.

In the fall of 1984, the first set of interviews was completed, using guiding questions presented as Teacher Interview Questions--Set I and Principal Interview Questions--Set I.

The second set of interviews was completed in Spring, 1985. Although the same schools were used, some different teachers were interviewed to get a broader perspective of teachers' perceptions. The principals were interviewed again with a different set of questions (see Principal and Teacher Interview Questions--Set II).

Data Summary

Following is a summary of what was found to be indicative of how teachers and administrators reacted to the Career Ladder Program as it was being implemented the first year. Reactions were generally consistent across grade levels (Elementary, Middle/Junior High, High School) in the systems visited. Where differences did occur, between districts, these will be noted in the discussion of results. A summary of results on the fall data is presented separately from the spring data.

Fall, 1984

Findings were consistent across school districts and grade levels concerning how the communication process was perceived. The general reaction has been negative based on: (1) the accuracy

Teacher Interview Questions--Set I

1. How comfortable are you with the information you had concerning CERA?
2. What is teacher morale like in your school at this time? (Beginning of year--has it changed?)
3. If you have a question concerning CERA, can your principal answer it? State Department? (Can you recall some specific instances?)
4. What are some positive points about the program?
5. What are your reservations?
6. Have there been evaluation teams in your school?
7. To what extent is TEA's voice the teachers' voice?
8. Have you taken the tests? Which one?
9. Do you foresee parents asking about career levels of teachers?
10. What do you see as the probable longevity of this program?
11. What recommendations would you make to another state or system considering career ladders?

Principal Interview Questions Set--I

1. Do you foresee the emphasis of your responsibilities changing as the result of this program?
2. Will information on teacher career levels be public information? Do you anticipate parent inquiry and requests for student placements?
3. What is the overall reaction of your faculty to this program?
4. How will the summer program work? What schools will be open and who will organize what teachers will do?
5. What recommendations would you make to another state or system considering career ladders?

Teacher Interview Questions--Set II

1. What communication/materials have you received since January? From whom?

2. Have you been evaluated? How would you rate the process thus far? Do you have any reservations about it? What kind of feedback have you received from others going through the evaluation process?

3. What is your reaction to the removal of the teacher interview as part of the evaluation process?

4. If you are a Level II or III teacher and have chosen an 11 or 12-month contract, do you know what your summer responsibilities will be? Were you involved in the assignment?

5. What, if any, is TEA's stand on Levels II and III? What is your perception of the controversy over the rating scale?

6. When you are eligible for the next level, will you apply? Why or why not?

7. What do you perceive as being the issues critical to the success of CERA? What recommendations would you make to others?

Principal Interview Questions--Set II

1. Has the program affected the working relationship among your staff? How?

2. Please comment on your responsibility to carry out evaluations as outlined by the state.

3. What have been some specific comments from your faculty concerning evaluations by the state team? What have been your experiences?

4. What are your recommendations concerning the program for next year?

of information received; (2) availability of qualified persons at the district and state level to answer questions pertaining to the Career Ladder; (3) the changing nature of information; and, (4) the conflict of deadlines and what materials were received to make informed decisions concerning the deadlines. As a result of how this process was handled, teachers' anxiety levels rose and low morale was reported.

The official source of information about the Career Ladder was the State Department of Education. Additional sources included the teachers' association (TEA); Central Offices in each school district; District State Department Offices; Local chapters of the teachers' association; Teachers' Study Council; and building level administrators. Teachers received letters, bulletins and other publications from these various sources. A Hot-Line was staffed by both TEA and the State Department of Education, located in Nashville. The lines were understaffed, and teachers complained that they rarely used them because they were always busy.

Representatives of the State Department and state evaluators often did not have complete information to give teachers when making on-site visits or the information given was sometimes inaccurate. This was partly due to the changing nature of the program. Information that appeared to have been accurate one week may indeed have changed several weeks later as the Interim Certification Commission (responsible for policy and development recommendations) continued to develop and finalize the Career Ladder Program during the implementation period. For example, out-of-state teachers

teaching for the first time in Tennessee during the 1984-85 school term were informed in the fall of 1984 that the were not eligible to apply for Career Ladder status until they had a minimum of one year of teaching experience in Tennessee. A ruling by the State Board of Education later in the year changed this requirement to allow out-of-state teachers with three years of experience and a positive evaluation regardless of the state in which the teacher had worked to apply for the Career Ladder.

Principals agreed that information they received to relate to teachers was often unclear or was late to meet deadlines. Orientation manuals designed to assist those applying for Career Levels II and III in preparing for the state evaluation process arrived late in several districts. In some cases, teachers received them after the evaluation process had begun, or did not receive them at all. Information packets and application forms for testing dates sometimes arrived one week or one day before they were due back in the State Department. Considering the newness of the program, the communication process was an important link to teachers understanding and accepting it. Partially responsible for teachers apprehension was the breakdown in this process between the state and local level.

Consistent across districts was the response to the state adopted staff development model (TIM). Teachers seemed to be positive about the purpose of the training would serve. They felt that there was a lot of useful information that would help them in their teaching strategies, classroom management, and instructional

planning. There seemed to be a prevailing attitude that the 40-hour module was not a mere paper exercise but something that could be useful to them individually and could be used in the classroom. Reservations concerning TIM centered around the inconsistency with which the 40-hour module was taught from district to district and the perceived rigidity of the structure on which TIM was based.

At the time teachers were interviewed in the fall, few had begun the actual evaluation process which started in late October. Most perceptions of the statewide evaluation were based on information about the process developed by the Interim Certification Commission. Many teachers felt that a lot of planning had been devoted to designing the evaluation system so that it would be a fair one. However, they expressed a frequent concern over whether outsiders could do a good job evaluating teachers in one day's visit each. There was also a concern about who the outside evaluators would be. This concern was especially evident in the rural districts, and reflected the view that an evaluator from a metropolitan district would not understand the teaching situation in a rural area in which there wasn't enough money for special programs; planning time was virtually nonexistent; teachers had bus duty and lunch duty; and leadership opportunities were few.

Teachers across all districts voiced concern about the portfolio--one of the multiple sources of data for the evaluation. For those who had received their Orientation Manual and read the guidelines for developing a portfolio, several questions were raised regarding the clarity of these guidelines. Teachers wanted more

specific instructions for preparing their portfolio. Others felt that it was merely a paper exercise--one that would take many hours of preparation and unnecessary documentation--and all for what purpose?

A question which many teachers asked about the final score of their evaluation was "How were the weights of the various multiple sources of data arrived at?" (peer, administrator, and student questionnaires; portfolio; observations). Although representatives from the Teachers' Study Council had input into this process the Interim Certification Commission approved the final weights. There was some discontent among teachers concerning these weights. Many felt that the principal in each school should have more input in the evaluation process and that the evaluation process was too impersonal. Teachers agreed that the principal knew what a teacher did and was capable of evaluating because he/she worked with the teacher on a daily basis.

There was general agreement concerning representation of teachers by the teachers' association (TEA). TEA was very active in the process of developing the reform legislation part of which was the Career Ladder. Teachers perceived TEA's involvement as supportive and consequently responded with approval of the changes TEA proposed in the first bills introduced concerning the Career Ladder Program.

Teachers voiced a strong objection to having to take a test either as an entry option for the Career Ladder or as a means of

progressing up the ladder. This objection seemed to be founded on the following premises: (1) Tests cannot tell how well a teacher teaches; (2) It is not fair to make teachers learn new terminology and when some have been out of school for many years; (3) We do not make a doctor of 20 years retake his/her medical boards; (4) We should test more rigorously at the college level and weed out the potentially poor teachers.

Other factors entered into the picture which contributed to this negative feeling about test taking. At two of the major testing sites, when teachers were taking a test as a fast-track option, conditions were very poor and some teachers were accused of cheating. The media had a heyday with this information which left a bad taste with teachers. The Career Ladder Test, a state adopted test with three parts (professional skills, reading, and writing) was being offered as one of the fast-track entry options. Even though teachers were given a study guide to prepare for the terminology used, many thought that the terminology represented one school of thought and was not appropriate or necessary in testing a teacher's skills or knowledge. Finally, there was objection to the absence of subject area tests for <u>all</u> subject areas. The NTE Core Battery, as perceived by teachers interviewed, was not sufficient to test both kindergarten teachers and twelfth grade chemistry teachers.

When asked how parents would react, the response differed from the elementary to the high school level. Generally, elementary teachers felt that parents in the community knew who the good teachers were and would not rely on the newly designated career

levels to determine with whom they would place their children. On the other hand, teachers at the larger middle and high schools seemed to think that parent placement requests would be a problem. Principals agreed that student placement would become even more of a problem than it already is. Teachers and principals interviewed in the fall were unsure whether information on teachers' career level status would be public information, or if so, what the policy was on disseminating this information? They also wondered how the public would perceive teachers who chose not to enter the Career Ladder? These questions had not been addressed by the State Department in the fall.

Reactions to what teachers and administrators thought the longevity of the Career Ladder would be ranged from, "It will go when the Governor goes in two years" to "If certain changes are made and there's funding, it will stay around." Teachers seemed to be optimistic about the concept underlying the Career Ladder but unsure as to the purpose for which it was first conceived. Many expressed concern that it was a political maneuver of the Governor's. Considering educational reform was a major thrust nationwide, clearly a state that first implemented a career ladder would be in the limelight. Others believed that funding was not sufficient to keep the program running. However, some teachers saw the program as a means of upgrading the profession in the public's eye and cast a vote optimistically for the program's survival past the 3-year mark.

Most teachers felt that entering the ladder, at least on the

first level, was worth the bonus money. However, many felt that the $1000 bonus was an insult, considering base salaries were so low. Regardless, money is money and teachers felt they deserved whatever they could get.

An eleven and twelve-month contract is available to Career Level II and III teachers. When asked what responsibilities teachers would have in the summer if an extended contract was chosen, neither teachers nor principals could answer. As of December 1984, no decisions had been made concerning summer work nor had teacher input with the districts been sought.

Recommendations for improving the program were consistent among teachers and administrators. Because the program had many things to be worked out in the fall, the list of recommendations was long. The recommendations most frequently addressed the areas of communication, organization, testing, evaluation, and the inclusion of teachers in designing the program at every step along the way. Other comments included concern over politics being at the base of the program and that perhaps the program was implemented too quickly. Following is a general list of recommendations and concerns made by those interviewed:

1. Be better organized. Do not change the rules in midstream.
2. Reduce the paperwork.
3. Improve the communication channels between: (A) state and local level; and (B) state and individual teacher.
4. Make sure program representatives have accurate information.
5. Make base salary and bonuses more attractive.

6. Simplify the portfolio.
7. Streamline the evaluation process.
8. Reduce the preparation time needed.
9. Do not take the upper career level teachers out of the classroom to serve in other capacities.

Spring, 1985

Spring interveiws were completed in late March and eraly April, 1985. At that time, teachers reported that information regarding the Career Ladder had been sent from several sources including the State Department, TEA, local education association offices, and school bulletins. The exception to this was the two rural districts visited. Teachers reported receiving little if any information about current Career Ladder developments (i.e. date to receive bonus checks, out-of-state teacher application status, removal of interview as data source in evaluation). Although information was sent from the State Department to local district offices the efficency and thoroughness with which this information was related to each school building varied from adequate in the larger city systems to poor in the rural areas. This information lag was particularly disturbing to teachers when bonus checks were not received on time in January. A computer breakdown at headquarters delayed many bonus checks. Information of this delay was not sent directly to teachers, but to district offices. Consequently, many teachers either heard through the grapevine why they had not received their bonus checks or not at all. Overall, the communication process had not improved from the Fall, even

though more information was being sent and from several sources. Teachers argued that the information was not coming directly to them and the official information they did receive was so late in coming that in most cases, the grapevine worked better.

Perhaps the most controversial aspect of the program for teachers was the evaluation process. Both principals and teachers reacted similarly in their assessment of the evaluation process. Few teachers debated the need for fair, systematic evaluation but many questioned the probability that such a system could be designed and implemented. As outlined in the concerns during the fall interviews, teachers continued to voice reservations about the capability of an evaluator being able to effectively do his/her job in one day's observation.

Other comments made about evaluators focused on the professionalism and the consistency with which evaluations were handled from system to system. Although there were some reports of an evaluator not doing a good job, for the most part, teachers felt that the evaluators acted in a professional manner. Unfortunately, teachers from different systems who had been through an evaluation reported differences on how closely the evaluator followed the state model. For example, some evaluators used terminology and concepts in TIM (staff development model) and expected the teacher to use them in his/her planning. Some evaluators gave helpful feedback to the teacher after the observation while other evaluators said teachers would have to wait until the end of the year to receive suggestions for improvement.

Evaluators were placed in a dilemma about giving feedback to teachers after each observation since they were not trained to analyze the data and provide this information. Unfortunately, teachers did not understand that evaluators were doing their job as they were prepared for it. Teachers felt that if they had received feedback, perhaps they could have improved their teaching between observations. By receiving notice at the end of the year that they had either passed or failed the total evaluation would not help them in their teaching.

A major concern of teachers was that preparation for the evaluation was too time consuming and for this reason alone, many teachers would not consider applying for Career Levels II and III. Of the items listed as too time consuming, the portfolio headed the list. Documentation for this particular item required five years of previous examples of various types of materials, including lesson plans, test items, disciplinary standards, leadership roles, etc. The interview (which ultimately was removed as a data source) lasted up to 6 hours in some instances and was conducted after school hours. Preparation time involved many more hours. Teachers consistently requested a plan which was less complicated, a less time-consuming evaluation system and one which required less paper work. On the local evaluation level, principals expressed similar sentiments. They felt the evaluation model was too involved and took up more of their time than they could or should devote to it.

There were mixed reactions concerning the removal of the

interview as a data source following a controversial release of unfinished rating scales. Some felt that preparation for and the actual process of going through the interview was so stressful and time consuming that removing it was justified. For those who had already completed the interview when it was announced that it would no longer be considered as part of the evaluation, there was a disgruntled feeling and a reaction that portrayed disappointment in the program changing at that late date.

Finally, consistent with findings in the fall, teachers in the rural areas expressed concern over the fairness of an evaluator from a metro-system evaluating them. For example, an elementary teacher in a rural area asked how she could earn points in the leadership area of the evaluation when her system provided no opportunities. No workshops had been conducted in her system. There was no money available to go to conferences as a presentor (Money was so tight that the school personnel had to raise money to pay the school's phone bill). Would she be penalized for a situation over which she had no control? There was no answer provided for her dilemma.

As late as April, neither teachers nor principals were aware of what the responsibilities of upper career level teachers would be in the summer if they chose an 11 or 12-month contract. Teachers were consistent in commenting that they had not been consulted about what these responsibilities should entail. Many speculated that they would be teaching summer school. Each district is responsible for setting its own rules and responsiblities for summer

work regarding the Career Ladder Program.

When teachers were asked if they would apply if eligible to move up the Career Ladder, many responded negatively. As mentioned earlier, the statewide evaluation was listed as one reason for not applying for advancement due to its complexity and time-consuming nature. Others complained that there was too much paperwork and anxiety. The reaction of some was to "wait and see" if teachers applying for upper career levels now thought it was worth the time and energy. A few said they would apply for higher career levels because they deserved the extra bonus and they were not going to miss out on the competitive spirit of moving up.

Many teachers not choosing to apply for upper career levels feared that a quota was being imposed on the number of Career Level II and III teachers who would actually make the rank. This fear stemmed from publicity that the state did not have adequate funding to support the Career Ladder Program, therefore only a small percentage of Career Level II and III teachers would actually pass the evaluation and receive the new status. Although there was no implicit quota set in the legislation, teachers believed (as reported by teachers and principals) that the standards for evaluation would be made so tough that, in essence, a quota was being imposed. Adding to this fear was the absence of feedback from evaluators after each classroom observation. In teachers' minds, this provided evaluators an opportunity not to have to explain their decision until the end of the year when it would be too late to correct any deficiencies a teacher may have had and any

opportunity to make ammendments before the second and third observations.

Recommendations from teachers and administrators for improving the program after interviews in the spring closely paralleled those made after interviews in the fall. After having experienced the effects of the Career Ladder process for nearly a school term, their comments reflected a concern for not having enough quality time in the classroom to "really teach." Time spent on paperwork for administrative purposes, record keeping and tasks that aides could handle as easily as teachers was a major complaint of both teachers and administrators. Following is a list of recommendations made by teachers and administrators interviewed as of April, 1985:

1. Be better organized. Do not change the rules in midstream.
2. Reduce the paperwork. A lot of it is repetitive and unnecessary.
3. Improve the communication channels between: (A) state and local level; (B) state and individual teacher. We would appreciate direct communication about our bonus checks and results of our evaluation.
4. Simplify the evaluation process. Five years of documentation is unnecessary.
5. Reduce the amount of money spent on administration of the program. This money could better be spent in raising teachers' base salaries and providing more substantial bonuses.
6. Slow the pace of implementation of a new program. If more time had been spent in pilot testing and working out the bugs, teachers and administrators would have been more receptive.
7. Make the evaluator training, selection, and monitoring process more stringent.
8. Take steps to clarify the purpose of the Career Ladder.

> Teachers are questioning whether the purpose is to: (A) attract and retain quality teachers; (B) pay teachers a bonus for passing statewide evaluation; (C) compete with other states in the race to implement statewide reform.

In the next chapter, the results of a statewide survey are reported. These data add further detail to the findings reported here from two sets of interviews conducted in eighteen schools located in six systems across Tennessee.

CHAPTER IV

Survey Results

Introduction

A statewide survey was conducted in February, 1985 to assess teachers' reactions toward the communication, fast-track, and evaluation components of the Career Ladder. The survey was conducted to generate a comparative set of data to analyze with interview data (see Chapter III) collected in the fall of 1984 and spring of 1985. It was also possible to complement the relatively small sample of the state's teachers interviewed with a much larger sample in the mailed survey. The survey provided teachers with an opportunity to respond to: (1) the quality and sources of communication during the first year of implementation; (2) the concept of fast-track and experiences with the various methods of fast-track on to the Career Ladder during the first year of implementation; (3) knowledge of state and local use of evaluation as well as the components of the evaluation process itself. Teachers were also given the opportunity to write comments addressing both strengths and weaknesses relating to the various items within each of the three major sections representing the Career Ladder Program.

Survey Instrument

In late Fall, 1984, the survey instrument was deveioped

(see Figure 1). The instrument contained four sections: (1) Communication; (2) Fast-tracking; (3) Evaluation; and, (4) Demographic Data. The first three sections were based on the major components of the Career Ladder for teachers during its first year of implementation (1984-85). The section on demographic data included information concerning: (1) grade level; (2) eligible Career Level; and, (3) geographic location. Instructions assured teachers that neither their names nor schools would be identified. In early December 1984, the instrument was pilot tested in a Knox County middle school. The results from this pilot study were sent with the instrument to the State Department of Education, Office of Research and Development for review. The results were also reviewed by the project's three management team members. Revisions were made in January and the survey was conducted in February 1985.

Survey Sample

The sample for this survey was selected from the eighteen districts geographically spanning the entire state which are used by the Teachers' Study Council in organizational framework. One school system was randomly selected from each of these eighteen council districts. Within each school system an elementary school, a middle/junior high school, and a high school were selected. Thus, fifty-four schools were included in the study. The entire faculty of each school was asked to complete the survey. Out of 2105 surveys sent, 1039 were

SHAPING TENNESSEE'S CAREER LADDER PROGRAM--1983-84
QUESTIONNAIRE

Directions: For each question, circle or check your response or make comments in the space provided. Please answer all questions.

COMMUNICATION

1. How do you assess the quality of communication you have received about the Career Ladder Program? Very Positive | Generally Favorable | Some Concerns | Strong Reservations

2. Information sources:

	Have you used this source?		Did you get the information you wanted?			Was the information accurate?			
	Yes	No	Yes	No	Some-times	Yes	No	Some-times	Examples/Comments
State Dept. (Nash. Staff)									
State Dept. (District Office)									
State Dept. Mailings									
Evaluators for Career Ladder									
School system (Central Office)									
Principal									
Peers									
Teachers' Study Council									
TEA Staff/Representatives									
TEA Mailings (e.g. TEA News)									
News Media									
Other: _____									

FAST-TRACKING

1. How much do you favor the concept of fast-track entry as part of a career ladder program? Very Positive | Generally Favorable | Some Concerns | Strong Reservations

2. Identify strengths AND/OR weaknesses you perceive concerning each fast-track option:

	Did you take this? Yes	No	Strengths	Weaknesses
NTE-Core Battery			1. _____	1. _____
			2. _____	2. _____
NTE-Specialty Area			1. _____	1. _____
			2. _____	2. _____
Career Ladder Test			1. _____	1. _____
			2. _____	2. _____
Staff Development			1. _____	1. _____
			2. _____	2. _____
Full Evaluation			1. _____	1. _____
			2. _____	2. _____

	Yes	No	Strengths	Weaknesses
VTE-Core Battery			1. 2.	1. 2.
VTE-Specialty Area			1. 2.	1. 2.
Career Ladder Test			1. 2.	1. 2.
Staff Development			1. 2.	1. 2.
Full Evaluation			1. 2.	1. 2.

EVALUATION

1. How much do you favor the concept of a statewide evaluation process for teachers? Very Positive / Generally Favorable / Some Concerns / Strong Reservations

2. How familiar are you with the ways local evaluation (your school system) fits into the Career Ladder Program? Very Familiar / Generally Familiar / A Little Familiar / Not at all Familiar

3. Identify strengths AND/OR weaknesses you perceive concerning each evaluation data source:

	Have you experienced this? Yes	No	Strengths	Weaknesses
Observation of Classroom Performance			1. 2.	1. 2.
Student Questionnaire			1. 2.	1. 2.
Peer Questionnaire			1. 2.	1. 2.
Principal Questionnaire			1. 2.	1. 2.
Professional Skills Test			1. 2.	1. 2.
Candidate Interview			1. 2.	1. 2.
Portfolio			1. 2.	1. 2.

Career Information

1. School system: _____
2. Grade level(s)/subject(s) taught: _____
3. What is the highest level you are eligible for?
   Probationary Apprentice I II III
4. Have you applied for the Career Ladder this year?
   Yes No
   If yes, 4: Did you fast-track? Yes No
   5: What level did you apply for?
   (Prob.) (App.) I II III
5. If no, but you meet qualifications, please explain.
   _____
   _____

returned. Demographic features of the sample are presented in a subsequent section of this chapter.

Procedure

In February 1985, letters were sent to the superintendents of each system seeking their cooperation. Principals were contacted by telephone and letter, with all those selected expressing willingness to participate.

A packet of surveys was sent to each participating principal. The package included an instruction letter on how to complete the surveys and return them in an enclosed post-paid envelope. Each faculty member could complete the survey independently and return it for mailing to their school office or contact person. Two weeks were allowed for completion and return of the surveys. Follow-up phone calls were made to schools that had not returned them by the end of February.

Computer Analysis

The survey instrument contained extensive opportunities for respondents to provide personal comment and examples. These opportunities were well utilized with 720 of 1039 returns containing usable remarks. Data from the survey instrument were analyzed in two separate categories: (1) item response (each item that required a response consisting of an "x" or a circled judgement), and (2) written comments. Both sets of data were analyzed through frequency distribution. The Statistical Analysis System (SAS) program was used in compiling

and analyzing the data (SAS Institute Inc.).

The "item response" data was analyzed across three variables: (1) District, (2) Grade Level, (3) Career Level. The variable "District" was included to determine if geographical location made a difference in teacher response. The variable "Grade Level" was included to determine if teachers' perceptions of the Career Ladder differed among elementary schools, middle/junior high schools, and high schools. The variable "Career Level" was included to determine if years of teaching experience made a difference in teachers' perceptions of the Career Ladder.

A content analysis framework was developed for the processing of the comments made on the surveys. Based upon three independently analyzed samples of approximately one hundred returned surveys, categories for the content analysis were developed. These were accepted as being representative of the range of responses in the overall set of questionnaires.

Examples and comments concerning communication sources were classified under this framework as:

1. Helpful (i.e. mailings were sent, workshops were conducted)
2. Not useful (i.e. information received was inaccurate, unclear)
3. Positive Availability (the source of communication was readily available for information)
4. Negative Availability (the source of communication was not readily available for information)

In the fast-track portion of the instrument, responses

concerning the five fast-track options (NTE Core Battery, NTE Specialty Area Test, Career Ladder Test, Staff Development, Full Evaluation) were categorized according to sets of seven to thirteen statements applicable to each option. These statements denoted positive or negative remarks concerning such factors as length, content, and appropriateness for purpose.

The analysis framework for each component of the evaluation process contained a set of eight categories reflecting positive or negative remarks about: appropriateness (e.g. useful feedback, objective), time involved, suitability as a measure of teaching performance, and nature of the experience for the teacher. In addition, comments not applicable to a specific feature of the communication, fast-track, or evaluation processes were coded under a set of general remark statements. These included positive or negative assessments of: teacher morale, the bonus pay, political influence, merit of the program itself, and nature of the respondent's experience.

Each return was read and coded for computer processing by one of two trained raters who met regularly to discuss any unclear entries. With few exceptions, the analysis frameowrk was found to cover survey responses effectively.

The following four subsections of this chapter (Demographic Data, Communication, Fast-Tracking, and Evaluation) focus on the results of the survey computer analysis. Tables and histograms highlighting statewide percentages have been included. Statistics that vary greatly in either direction from the

statewide results have been included in the discussion of data. A code sheet describing the variable abbreviations precedes this discussion (see Table 7).

Demographic Data

The following information should provide the reader with a better understanding of the sample used for this survey. Of the 1039 teachers responding to the survey, 43.1% represented high schools (see Table 8). Teachers with 12 or more years of teaching experience comprised a large percentage of this sample (47.8%) as compared to beginning teachers (2.8%). Variations from this included the South Central District-Council 1 and the Southwest District. The South Central District comprised 38.7% respondents at Level I and a similar 32.3% at Level III eligibility. The Southwest District comprised 29.4% of the respondents at Level I and only 19.6 % at Level III.

The majority of teachers (86%) in this sample applied to enter the Career Ladder (see Table 9). In three of the districts (Memphis-Delta Councils 1 and 2, and Mid-Cumberland Council 2) this percentage dropped to 71%, 75%, and 71.4% respectively. Percentages were generally consistent across grade levels as compared to statewide findings concerning Career Ladder entry (see Table 9).

Teachers in their Probationary year were not eligible to apply for a Career Level. Teachers at the Apprentice Level

Table 7

Definitions of Terms and Variables Used in Tables

Code	Definition
PROB	Probationary Level (1st year teacher on Career Ladder)
APPR	Apprentice Level (2-4 years on Career Ladder)
I	Level I (5-8 years on Career Ladder)*
II	Level II (9-12 years on Career Ladder)
III	Level III (12^{+} years on Career Ladder)
NLVL	No Career Level was indicated
NRSP	No response to this item was marked

*Note: for current teachers, equivalent years of experience were required to be eligible for particular career levels.

Table 8

Number of Respondents by District, Grade Level, and Eligibility Level

District	Totals	Grade Level			Eligibility Level					
		Elem	Midd	High	PROB	APPR	I	II	III	No Level Given
First Tennessee-Council 1	63	25.4	49.2	25.4	3.2	0.0	28.6	20.6	42.9	4.8
First Tennessee-Council 2	80	0.0	35.0	65.0	5.0	5.0	22.5	16.2	42.5	8.7
East Tennessee-Council 1	92	25.0	22.8	52.2	1.1	2.2	27.5	15.2	48.9	4.9
East Tennessee-Council 2	41	31.7	39.0	29.3	7.3	0.0	19.5	24.4	43.9	4.9
East Tennessee-Council 3	77	23.4	41.6	35.1	0.0	1.3	20.8	7.8	62.3	7.8
East Tennessee-Council 4	30	0.0	73.3	26.7	0.0	3.3	30.0	26.7	40.0	0.0
Southeast District-Council 1	51	39.2	0.0	60.8	3.9	0.0	19.6	19.6	54.9	2.0
Southeast District-Council 2	55	21.8	25.5	52.7	0.0	0.0	21.8	9.1	56.4	12.7
Upper Cumberland	23	30.4	30.4	39.1	0.0	0.0	21.7	26.1	34.8	17.4
Mid-Cumberland-Council 1	21	28.6	9.5	61.9	4.8	0.0	9.5	28.6	28.6	28.6
Mid-Cumberland-Council 2	98	29.6	10.2	60.2	2.0	3.1	23.5	18.4	48.0	5.1
Metro Council	96	18.8	35.4	45.8	1.0	2.1	11.5	15.6	63.5	6.3
South Central-Council 1	31	61.3	6.5	32.3	6.5	0.0	38.7	19.4	32.3	3.2
South Central-Council 2	57	50.0	32.1	17.9	3.6	1.8	16.1	26.8	46.4	5.4
Northwest District	56	50.0	32.1	17.9	3.6	1.8	16.1	26.8	46.4	5.4
Southwest District	51	31.4	68.6	0.0	2.0	3.9	29.4	35.3	19.6	9.8
Memphis Delta-Council 1	73	35.6	0.0	64.4	4.1	1.4	16.4	11.0	52.1	15.1
Memphis Delta-Council 2	44	25.0	0.0	75.0	2.3	0.0	13.6	9.1	56.8	18.2
Statewide	1039	28.2	28.7	43.1	2.5	1.8	22.0	17.9	47.8	7.9

Table 9

Percentages of Respondents Applying for the Career Ladder by Grade Level and Career Level

	Totals	Percent that Applied	Percent That Had Not Applied	Did Not Respond
Grade Level				
Elementary	293	85.0	12.3	2.7
Middle School	298	87.9	8.4	4.0
High School	448	85.5	8.7	5.6
Eligible Career Level*				
Level I	229	93.4	6.1	0.4
Level II	186	97.2	2.2	0.0
Level III	497	93.4	6.2	0.4
No Level Given	82	29.3	23.2	47.6
Statewide	1039	86.0	9.6	4.3

*Probationary and Apprentice teachers did not go through an application for the career ladder.

must have completed four years of teaching to be eligible to apply for a Career Level. For this reason, these levels have been omitted from Table 9 . More than 90% of teachers eligible to apply for career levels I, II, or III applied for at least Level I.

Of the teachers eligible to fast-track onto the Career Ladder in 1984-85, 83.3% chose to do so (see Table 10). Teachers with four or more years of teaching experience were elegible to enter through this option (see Table 10). The fast-track options included successfully passing either the NTE-Core Battery, NTE-Specialty, or Career Ladder Test; successfully completing a 40-hour staff development module; or successfully completing a full evaluation process. All teachers applying in subsequent years will have to complete a year's full evaluation process as outlined in state guidelines.

Communication

When teachers were asked to assess the overall quality of communication related to the Career Ladder Program, 40% responded that they had "some concerns" while 23% said they had "strong reservations" (see Table 11). Only 3.3% of the teachers responded with "very positive". These responses indicate that the communication process was not perceived as adequate for teacher needs. These results were consistent across grade levels and career levels.

In this survey, the communication process was broken down

Table 10

Percentage of Respondents Fast Tracking to Enter Career Ladder, by Grade Level and Career Level

	Totals	Percent Fast Tracking	Percent Not Fast Tracking	Did Not Respond
Grade Level				
Elementary	293	82.9	2.0	0.0
Middle School	298	85.2	2.3	0.3
High School	448	82.4	1.8	1.3
Eligible Career Level*				
Level I	229	90.8	2.2	0.4
Level II	186	96.2	1.6	0.0
Level III	497	90.3	2.2	0.8
No Level Given	82	26.8	0.0	2.4
Statewide	1039	83.3	2.0	0.7

*Probationary and Apprentice teachers did not have sufficient years of experience to fast track.

Table 11

Percentage Responses Concerning Quality of Communication About the Career Ladder, by Grade Level and Career Level

	Totals	Very Positive	Generally Favorable	Some Concerns	Strong Reservations	No Response
Grade Level						
Elementary	293	2.7	18.4	43.7	25.3	9.6
Middle School	298	3.7	21.1	44.0	20.5	11.1
High School	448	3.3	23.9	35.5	23.4	13.8
Eligible Career Level						
Probationary	26	0.0	23.1	53.8	15.4	7.7
Apprentice	19	0.0	21.1	42.1	21.1	15.8
Level I	229	4.8	25.3	42.8	18.3	8.7
Level II	186	2.2	21.5	43.5	25.3	7.5
Level III	497	3.2	20.1	38.0	24.9	13.7
No Level Given	82	3.7	19.5	34.1	23.2	19.5
Statewide	1039	3.3	21.6	40.2	23.1	11.8

into eleven sources most likely to have provided information about the Career Ladder Program. Teachers were asked to respond in three ways to each of these sources: (1) Have you used this source? (2) Did you get the information you wanted? and (3) Was the information accurate? The results of their responses are summarized in the following paragraphs.

Half (50.6%) of the teachers used the State Department of Education as a source of information with 24.6% responding that they had received the information they wanted and 18.7% responding that it was accurate (see Table 12). Responses to this source of communication concerning the overall process suggest teachers were not satisfied with the information received. South Central, Southwest, and Memphis-Delta Council 1 Districts all had few teachers (33.3%, 39.2%, 35.6%) who used the State Department of Education as a source of information. The Mid-Cumberland Council 1 District had a greater percentage (57.1%) of teachers responding that the information was accurate only "Sometimes" than did other districts. Teachers in this district also responded in greater numbers than other districts with "Sometimes" in relation to the accuracy of information received. It appears that teachers were somewhat less than satisfied with the information received from this source.

Responses were consistent across grade levels with statewide findings (see Table 13). Probationary and Apprentice teachers tended to use the State Department of Education far less than

Table 12

Percentages of Responses in Statewide Sample Concerning Information Sources

	Use of Source			Got Information Wanted				Accuracy of Information			
	NRSP	Yes	No	NRSP	Yes	No	Some-times	NRSP	Yes	No	Some-times
State Dept.-Nashville Staff	10.5	50.6	38.8	45.9	24.6	7.4	22.0	51.2	18.7	6.0	24.2
State Dept.-District Office	15.4	26.6	58.0	68.6	14.3	7.3	9.7	73.2	11.5	4.1	11.2
State Dept.-Mailings	8.8	73.6	17.6	29.8	34.6	6.8	28.7	37.4	29.4	4.5	28.2
Evaluators for Career Ladder	12.0	33.2	53.7	63.0	15.0	9.3	12.6	68.5	11.8	5.3	14.3
School System Central Office	9.9	67.1	22.9	35.6	37.2	7.1	20.1	41.3	31.9	8.3	23.0
Principal	7.8	77.3	14.9	26.3	49.1	4.5	20.1	33.9	44.7	2.8	19.2
Peers	9.9	80.7	9.3	25.0	30.1	6.3	38.6	30.4	19.4	3.7	46.5
Teachers' Study Council	14.4	31.6	54.0	56.8	15.9	6.7	11.5	71.1	12.9	3.2	12.8
TEA Staff/Representatives	13.4	40.1	46.5	60.4	21.8	5.3	12.5	64.8	18.4	2.8	14.1
TEA Mailings	7.2	76.1	16.7	29.5	41.5	4.4	24.5	35.3	39.0	2.2	23.5
News Media	10.4	71.3	18.3	34.4	14.2	13.6	37.8	39.1	10.8	8.9	41.3

Table 13

Percentage Responses Concerning Infromation by Respondents' Grade Levels

Information Source	Use of Source			Got Information Wanted				Accuracy of Information			
	NRSP	Yes	No	NRSP	Yes	No	Some-times	NRSP	Yes	No	Some-times
State Dept.-Nashville Staff											
Elementary	12 6	43.0	44.4	53.2	19.8	6.1	20.8	58.7	15.4	5.1	10 8
Middle	11.7	49.0	39.3	47.7	25.2	6.4	20.8	53 0	20.1	4.7	22 1
High School	8.5	56.7	34.8	40.0	27.5	8.9	23.7	45.1	19.9	7.4	27.7
State Dept.-District Office											
Elementary	17 4	26.6	56.0	60.3	14.7	5.5	10.6	76 1	9.9	3.4	10.6
Middle	14.8	29 5	55.7	65 8	15.8	6.4	12.1	70.1	12.8	3 4	13 8
High School	14.5	24 6	60 9	70.1	13.2	9.2	7.5	73.4	11.5	5.1	9.8
State Dept -Mailings											
Elementary	9.9	70.0	2.0	35.2	30.4	6.1	28.3	42.0	28.7	3.1	26.3
Middle	1.7	76.8	15.4	26.2	38.3	5.4	30 2	3.8	32.9	4.4	30.2
High School	8.7	13.9	17.4	28 8	35 0	8.3	27.9	37 7	28.6	5.6	28.1
Evaluators for Career Ladder											
Elementary	12.6	29.0	58.4	67.9	13.3	8.2	10.6	73 4	10.2	5.8	10.6
Middle	12.1	38.9	49.0	58.1	17.4	10.1	14.4	63 4	14.1	6.7	15.8
High School	13.8	32.1	53.8	63.2	14.5	9 6	12.7	68.8	11 4	4.0	15.8
School System Central Office											
Elementary	10.2	70.0	19.8	32.8	35.9	5.8	22.5	40.6	34.1	2.0	23.2
Middle	10.1	6 5	18.1	31.5	38 3	6.7	23.5	37.2	33.2	5.4	24.2
High School	9.6	62.1	28.1	40.2	35 3	8 3	16.3	44.4	29.5	4.4	22.1

Principal											
Elementary	8.2	82.3	9.6	22.2	53.2	3.1	21 5	31 1	48 1	1.4	19.5
Middle	6.7	79.9	13.4	21.8	49.7	5.7	22.8	31 5	43.6	3.4	21 5
High School	8 3	72.3	19.4	31.9	46.0	4.7	17.4	37.3	43.1	2.2	17.4
Peers											
Elementary	9 6	79.5	10.9	28.0	27.6	5.8	38.5	35.5	18 8	3.4	42.3
Middle	7.4	85.2	7.4	19 5	29.5	5.4	45.6	24.2	18.5	4.4	5.2
High School	11.8	78.3	9.6	26.8	32.1	7 1	33.9	31.3	20.5	3.3	44.9
Teachers' Study Council											
Elementary	15.7	38 5	45.7	60.8	18.8	5 5	15.0	68.9	10.0	1.4	13.7
Middle	13.4	31 2	55.4	64.1	15.4	8 4	12.1	69.8	9.7	5.7	14.8
High School	14.3	27.2	58.5	70 3	14.3	6 5	8.9	73.4	12.9	2.7	10.9
TEA Staff/Representatives											
Elementary	11.6	55.0	44.4	61.4	18.8	3.4	16.4	68.3	14.7	1.4	15.7
Middle	12.8	42.5	44 6	55.4	24.8	6 4	13.4	58.1	20.8	4.0	17.1
High School	15.0	35.9	49.1	63.2	21.7	5.8	9 4	67.0	19.2	2.9	10.9
TEA Mailings											
Elementary	7.5	79 5	13.0	29.0	38.6	3 8	28 7	38.6	37.5	3	24.8
Middle	6.4	77.9	15.8	27.5	44.0	4 4	24.2	31.5	40.6	3.0	22.5
High School	7.6	72.8	19.6	31.3	41.7	4.9	22.1	35.7	38.6	2.9	22.5
News Media											
Elementary	10.2	75.1	14.7	35 5	15.4	11 3	37.9	41.6	10.9	7.5	39.9
Middle	8.4	74.2	17.4	30.5	41 1	13.4	41.9	34.6	11.1	10.1	44.3
High School	11.8	67 0	21.2	36.2	13 6	15 2	35.0	40.4	10.5	8 9	40 2

NRSP = No response, N = Elementary 293, Middle 298, High school 448

did teachers at other career levels (see Table 13). A greater percentage of Probationary teachers (19.2%) than other levels responded that the information received was not what they wanted.

Over half (58%) of the teachers responding indicated they did not use the District State Department Office as a source of information. Teachers who did use this source varied in their perception of whether or not they received the information they wanted (14.3% "Yes", 9.7% "Sometimes", 7.3% "No"). The biggest difference occurring between statewide findings and individual districts regarding the question on "information wanted" was the Mid-Cumberland Council 2 District. None of the teachers responding in this district thought they had received information that they wanted from this source. The greatest difference concerning the question on "accuracy of information" in statewide and district findings occurred in the First-Tennessee Council District. A considerable number of teachers (42.9%) who responded perceived the information to be accurate from the District Office.

Responses across grade levels were consistent with overall findings (see Table 13). When analyzed by career level eligibility, a greater percentage of Level II and III teachers responded with "yes" to the question of acquisition of information wanted than did teachers at other levels (see Table 12). Teachers eligible for Level III also responded "yes" in greater numbers to the question of accurate information than did other teachers.

Table 14

Percentage Responses Concerning Information Sources by Respondents' Career Level Eligibility

	Use of Source			Got Information Wanted				Accuracy of Information			
	NRSP	Yes	No	NRSP	Yes	No	Some-times	NRSP	Yes	No	Some-times
State Dept.-Nashville Staff											
Probationary	7.7	15.4	76.9	69.2	3.8	19.2	7.7	84 6	11.5	3.8	0.0
Apprentice	5.3	26 3	68.4	68.4	5.3	5.3	21.1	73 7	5.3	15.8	5.3
Level I	9.2	45.4	45.4	48 5	27.1	3.9	20 5	52 0	20 1	5.2	22.7
Level II	6.5	55 4	38.2	42.5	28.5	7.0	22 0	49.5	22.0	3.8	24.7
Level III	11.1	55 9	33.0	43.1	24.7	7.8	24 3	48.1	18.3	6.8	26.8
Not Given	23.2	39.0	37.8	51 2	19.5	12.2	17 1	56.1	14.6	6.1	23.2
State Dept.-District Office											
Probationary	15.4	7 7	76.9	76.9	3 8	15 4	3 8	88.5	7.7	3.8	0.0
Apprentice	5.3	15.8	78.9	73 7	10.5	5.3	10.5	73.7	5.3	10.5	10.5
Level I	14.0	21.0	65.1	72.9	12.7	7 0	7.4	75.5	9.6	4.8	10.0
Level II	12.9	29.0	58.1	65.6	15.1	7.5	11.8	74.2	9 7	3.2	12.9
Level III	15.5	30.8	53.7	66.4	16.7	6.2	10 7	70.4	13.5	4.2	11.9
Not Given	26.8	19.5	53.7	73.2	7.3	12.2	7.3	76.8	11.0	2.4	9.8
State Dept -Mailings											
Probationary	15.4	23 1	61.5	61.5	11.5	15.4	11.5	73.1	11 5	7.7	7.7
Apprentice	5.3	63.2	31.6	31.6	26.3	0.0	42.1	42.1	15.8	5.3	36.8
Level I	8.3	74.2	17 5	26.6	41 5	4.4	27.5	33.2	38 0	3.9	24 9
Level II	7.0	78.0	15.1	25.3	32 8	8.1	32.8	36.6	29.0	4 8	29 6
Level III	8 5	77 5	14 1	29 0	32.2	6.4	29 4	35.8	29 0	4.6	30 6

Not Given	14.6	57.3	28.0	41.5	25.6	12.2	20.7	48.8	23.2	3.7	24.4
Evaluators for Career Ladder											
Probationary	15.4	19.2	65.4	69.2	7.7	11.5	11.5	80.8	7.7	3.8	7.7
Apprentice	10.5	10.5	78.9	84.2	5.3	5.3	5.3	84.2	19.5	5.3	0.0
Level I	10.5	24.0	65.5	72.9	10.5	7.4	9.2	74.2	9.2	5.7	10.9
Level II	6.5	45.7	47.8	53.2	20.4	8.6	17.7	59.1	16.1	4.8	19.9
Level III	14.7	36.2	48.9	59.8	16.9	9.9	13.5	67.0	12.7	5.4	14.9
Not Given	24.4	22.0	53.7	70.7	8.5	13.4	7.3	75.6	6.1	4.9	13.4
School System Central Office											
Probationary	7.7	50.0	42.3	42.3	34.6	7.7	15.4	61.5	30.8	3.8	3.8
Apprentice	0.0	68.4	31.6	26.3	21.1	5.3	47.4	26.3	26.3	10.5	36.8
Level I	8.3	69.4	22.3	33.2	39.3	6.1	21.4	35.8	35.8	2.6	25.8
Level II	6.5	74.2	19.4	29.0	37.1	7.5	26.3	36.6	31.7	3.8	28.0
Level III	10.7	66.2	22.9	38.2	37.4	6.4	17.9	43.7	31.0	4.0	21.3
Not Given	20.7	54.9	24.4	41.5	34.1	13.4	11.0	50.0	28.0	4.9	17.1
Principal											
Probationary	0.0	88.5	11.5	15.4	65.4	7.7	11.5	42.3	46.2	0.0	11.5
Apprentice	5.3	78.9	15.8	21.1	63.2	0.0	15.8	21.1	57.9	5.3	15.8
Level I	7.4	80.3	12.2	22.3	54.1	3.1	20.5	27.9	52.0	1.3	18.8
Level II	4.3	82.8	12.9	19.9	47.8	5.4	26.9	32.3	41.9	2.7	23.1
Level III	8.7	75.9	15.5	29.8	47.7	3.8	18.7	36.0	42.3	2.0	19.7
Not Given	14.6	61.0	24.4	35.4	37.8	11.0	15.9	41.5	41.5	6.1	11.0
Peers											
Probationary	7.7	84.6	7.7	15.4	42.3	7.7	34.5	42.3	34.6	0.0	23.1
Apprentice	5.3	73.7	21.1	25.3	21.1	5.3	47.4	36.8	10.5	5.3	47.4
Level I	8.7	80.3	10.5	23.6	33.2	4.8	38.4	27.1	20.5	2.2	50.2
Level II	5.4	87.1	7.5	19.4	30.1	4.8	45.7	24.7	18.8	1.6	54.8
Level III	11.1	80.5	8.5	26.4	30.0	6.6	37.0	31.4	18.1	5.4	45.1
Not Given	18.3	68.3	13.4	36.6	20.7	11.0	31.7	41.5	23.2	2.4	32.9

Teachers' Study Council											
Probationary	19.2	19.2	61.5	65.4	7.7	15.4	11.5	76.9	11.5	7.7	3.8
Apprentice	10.5	15.8	73.7	84.2	10.5	0.0	5.3	84.2	10.5	5.3	0.0
Level I	14.0	24.9	61.1	72.1	13.1	3.5	11.4	73.8	10.5	2.6	13.1
Level II	9.2	34.4	56.5	62.4	15.6	10.8	11.3	70.4	8.1	4.8	16.7
Level III	14.9	35.6	49.5	63.4	18.5	5.8	12.3	69.2	15.9	2.2	12.7
Not Given	24.4	26.8	48.8	67.1	12.2	11.0	9.8	72.0	13.4	4.9	7.8
TEA Staff/Representatives											
Probationary	11.5	15.4	73.1	73.1	7.7	15.4	3.8	84.6	7.7	7.7	0.0
Apprentice	5.3	26.3	68.4	73.7	15.8	0.0	10.5	78.9	15.8	0.0	5.3
Level I	11.4	35.4	53.3	64.2	18.3	5.2	12.2	66.4	16.6	3.5	
Level II	11.3	41.4	47.3	59.1	22.0	3.2	15.6	65.6	15.6	1.6	17.2
Level III	14.1	42.9	43.1	48.8	24.1	5.2	11.9	62.4	19.9	2.6	15.1
Not Given	22.0	45.1	32.9	56.1	22.0	8.5	13.4	63.4	24.4	3.7	8.5
TEA Mailings											
Probationary	19.2	46.2	34.6	42.3	23.1	15.4	19.2	61.5	23.1	3.8	11.5
Apprentice	5.3	68.4	26.3	37.6	42.1	0.0	26.3	42.1	31.6	5.3	21.1
Level I	7.4	76.4	16.2	31.0	39.7	3.1	26.2	33.2	40.2	1.7	24.9
Level II	5.4	77.4	17.2	28.0	40.9	4.8	26.3	37.1	35.5	1.6	23.9
Level III	6.0	79.3	14.7	26.6	46.7	3.8	22.9	31.6	42.3	2.2	23.9
Not Given	14.6	64.6	20.7	42.7	22.0	8.5	26.8	50.0	30.5	3.7	15.9
News Media											
Probationary	11.5	61.5	26.9	26.9	19.2	15.4	38.5	50.0	15.4	15.4	19.2
Apprentice	0.0	68.4	31.6	31.6	21.1	5.3	42.1	36.8	10.5	5.3	47.4
Level I	7.9	74.7	17.5	32.8	16.2	10.0	41.0	33.2	14.4	6.1	46.3
Level II	8.1	81.7	10.2	22.0	17.2	16.1	44.6	34.4	12.4	7.0	40.6
Level III	11.1	69.2	19.7	37.0	12.9	14.3	35.8	40.0	8.9	10.5	40.6
Not Given	20.7	54.9	24.4	53.7	7.3	14.6	24.4	57.3	7.3	9.8	25.6

N = Probationary 26, Apprentice 19, Level I 229, Level II 186, Level III 497, NRSP = No response

Many teachers (73.6%) reported using the State Department Mailings as a source of information (see Table 12). Teachers' perceptions statewide of whether this information was what they wanted were split fairly evenly between the responses of "yes" (34.6%) and "sometimes" (28.7%). Although a small percentage (4.5%) of teachers responded with "no".

Findings across grade levels and career levels were consistent with those statewide (see Tables 13 & 14). The results indicate that teachers across the state perceived that communication through State Department Mailings provided information that teachers needed and could count on at least some of the time.

Approximately half of the teachers reported that they did not use evaluators as a source of information (see Table 12). Respondents were split in their perceptions of whether they got the information wanted and whether it was accurate.

More than half (67.1%) of the teachers reported as having used the Central Office in their school system as a source of information (see Table 12). Those who responded were generally favorable about the provision (37.2% "yes") and accuracy (31.9% "yes") of information, with slightly more than 20% responding that only "sometimes" was the information provided and/or accurate.

Findings were consistent across grade levels and career levels with those statewide (see Tables 13 & 14). The teachers who said they used their Central Office as a source of

information appeared to have found this source reliable and helpful at least some of the time.

A large percentage (77.3%) of teachers reported using their principal as a source of information (see Table 12). Relatively few teachers reported the information from this source as not being provided (14.9%) or accurate (2.3%). Findings across grade levels and career levels were consistent with those statewide (see Tables 13 & 14).

A substantial percentage of teachers (80.7%) used their peers as a source of information (see Tables 13 & 14). Perceptions regarding the obtaining of information were divided between the "yes" (30.1%) and "sometime" (38.6%) responses. Almost half of the teachers agreed that "sometimes" the information was accurate while 19% thought it was accurate. East Tennessee District-Council 1, East Tennesse District-Council 2, and Mid Cumberland District-Council 1 differed somewhat from statewide findings. Teachers in these districts more often marked the information received from peers as "sometimes" obtained and accurate.

Findings across grade levels and career levels were consistent with those statewide (see Tables 13 & 14). Teachers seemed to seek information from their peers, but the information they received was not consistently accurate.

The Teachers' Study Council is a relatively new organization initiated by and housed within the State Department of Education. It includes local system and broader regional or district teacher

representation. An important part of the Council's stated purpose is to provide avenues for input and dialogue regarding teachers' concerns on various issues, including the Career Ladder Program. Approximately one-third (31.6%) of the teachers said they used the Teachers' Study Council as a source of information (see Table 12). A large percentage did not respond to the questions of "information wanted" and "accuracy of information". Those who did respond were fairly evenly divided between their response of "yes" and "sometimes" regarding provision and accuracy of information. District responses to the use of this source of information ranged from a high of 76.2% (Mid Cumberland District-Council 1) to a low of 16.7% (East Tennessee District-Council 4). Findings across grade levels and career levels were consistent with those statewide (see Tables 13 & 14).

Approximately 40% of the teachers said they used information from Tennessee Education Association's (TEA) staff and 46% said they did not (see Table 12). More than half of the teachers did not respond to the questions on "information wanted" and "accuracy of information". Of those who did respond, perceptions indicated that the information was at least "sometimes" provided and accurate. Several districts differed from statewide findings concerning using TEA staff for a source of information. A greater percentage of teachers in the following districts did not report using TEA staff than statewide totals indicate: (1) First Tennesse District-Council 2 (56.3%); (2) East Tennessee

District-Council 4 (53.3%); (3) Southeast District-Council 1 (57.1%) (4) Southwest District-Council (52.9%); and (5) Memphis Delta District-Council 1 (54.8%). Teachers in several districts reported higher ratings of information accuracy than in statewide totals: (1) Upper Cumberland District-Council (30.4%); (2) Mid Cumberland District-Council 1 (33.3%); and (3) Metro District-Council (35.4%).

Findings across grade levels were consistent with those statewide (see Table 13). Fewer Probationary and Apprentice Level teachers reported using TEA staff as a source of information than did those eligible for upper career levels (see Table 14).

A large percentage (76.1%) of teachers reported using TEA Mailings as a source of information (see Table 12). Close to half of the respondents (41%) said the information was what they wanted and 39% said it was accurate. Another 23.5% said the information was "sometimes" accurate. Several districts had a greater percentage of teachers responding with "sometimes" as opposed to "yes" concerning whether the information received was what they wanted: (1) Southeast District-Council 1 (23.5%); (2) Mid-Cumberland District Council 1 (28.6%); and (3) South Central District-Council 2 (28.1%). Several districts had higher ratings on the accuracy of information than statewide totals: (1) First Tennessee District -Council 1 (58.7%); (2) Mid-Cumberland District-Council 1 (52.4%); (3) Metro Council (53.1%); (4) South Central District-Council 1 (64.5%); and

Memphis Delta District-Council 2 (50.0%).

Findings across grade levels and career levels were consistent with those statewide (see Tables 13 & 14). In general, many teachers statewide used TEA mailings as a source of information and seemed satisfied to some degree that the information was what they wanted and was accurate.

Considerable numbers of teachers statewide (71.3%) reported using the News Media as a source of information (see Table 12). More teachers responded with "sometimes" (37.8%) than "yes" (14.2%) to the question on "information wanted". Similar results occurred for accuracy of information. Findings indicated that although teachers looked to the news media for information, only "sometimes" did they get the information they wanted and only "sometimes" was it accurate. Findings across grade levels and career levels were consistent with those statewide (see Tables 13 & 14).

Fast-tracking

Survey results in the section pertaining to fast-tracking indicated how teachers viewed both the concept and the specific form it took in the Tennessee program. Among the 1039 respondents, 83.3% had used a fast-track option to enter the program (see Table 15). Percentages were similar across grade level divisions (see Table 16). When analyzed by eligible career level, higher percentages were revealed than those as shown across grade level divisions (see Table 17). In only

Table 15

Percentages of Total sample Responses Indicating Fast-Track Options Chosen by Respondents

Fast-Track Option	No Response	Yes*	No
NTE Core Battery	19.7	10.2	70.2
NTE Specialty Area	17.5	16.6	65.8
Career Ladder Test	15.4	32.6	51.8
Staff Development	15.9	44.3	40.0
Full Evaluation	26.9	8.2	65.0

N = 1039

*Respondents could have participated in more than one option.

Table 16

Percentage Responses Concerning Fast-Track Options by Respondents' Grade Levels

Fast-Track Option	No Response	Yes	No
NTE Core Battery			
Elementary	8.4	11.6	70.0
Middle	20.5	9.4	70.1
High School	20.1	9.8	70.3
NTE Specialty Area			
Elementary	16.0	16.7	67.2
Middle	2.7	2.3	67.8
High School	18.3	18.1	63.6
Career Ladder Test			
Elementary	13.3	28.0	58.7
Middle	15.1	36.6	48.3
High School	17.0	33.0	49.6
Staff Development			
Elementary	10.6	51.9	37.5
Middle	15.1	45.6	39.3
High School	19.9	38.4	42.2
Full Evaluation			
Elementary	25.9	5.5	68.6
Middle	28.5	7.7	63.8
High School	26.3	10.3	63.4

N=Elementary 293, Middle 298, High School 448

Table 17

Percentage Responses Concerning Fast Track Options by Respondents' Career Level Eligibility

Fast Track Option	Whether One Has Taken This Option		
	No Response	Yes	No
NTE Core Battery			
Probationary	19.2	38.5	42.3
Apprentice	21.1	21.1	57.9
Level I	14.0	10.0	76.0
Level II	16.1	12.9	71.5
Level III	21.9	7.2	70.8
Not Given	30.5	11.0	58.5
NTE Specialty Average			
Probationary	19.2	23.1	57.7
Apprentice	21.1	21.1	57.9
Level I	12.2	17.0	70.7
Level II	16.1	13.4	69.9
Level III	18.7	17.1	64.2
Not Given	26.8	15.9	57.3
Career Ladder Test			
Probationary	19.2	3.8	76.9
Apprentice	21.1	15.8	63.2
Level I	12.2	33.2	54.6
Level II	14.0	35.5	50.0
Level III	15.3	35.2	49.3
Not Given	25.6	22.0	52.4
Staff Development			
Probationary	15.4	15.4	69.2
Apprentice	21.1	10.5	68.4
Level I	11.4	41.9	46.7
Level II	16.7	50.5	33.3
Level III	16.5	47.7	36.0
Not Given	22.0	32.9	45.1

Table 17 (continued)

Precentage Responses Concerning Fast Track Options by Respondents' Career Level Eligibility

Fast Track Option	Whether One Has Taken This Option		
	No Response	Yes	No
Full Evaluation			
Probationary	23.1	7.7	69.2
Apprentice	26.3	0.0	73.7
Level I	20.5	6.6	72.9
Level II	29.0	7.0	64.0
Level III	27.8	10.3	62.0
Not Given	35.4	4.9	59.8

N=Elementary 293, Middle 298, High School 448

four of the eighteen geographical districts covering the state did the percentage fall below 80%. These were: (1) First Tennessee District-Council (77.5%); (2) Mid-Cumberland District-Council (66.7%); (3) Memphis Delta District-Council 1 (71.2%); and (4) Memphis Delta District-Council 2 (70.5%). Most of those eligible in terms of prior experience for at least Career Level I sought to apply for that level and receive a $1000 supplement.

When asked how much they favored the concept of fast-track entry as part of a career ladder program, most teachers surveyed indicated positive feelings (see Table 18). Very positive views were indicated by 30.4% of the 1039 respondents and generally favorable reactions by 35.5%. Eighteen percent of those responding had some concerns, while 7.1% had strong reservations about the fast-track concept and 9.0% did not respond.

Results at the elementary level were somewhat more negative than at the other two levels regarding fast-tracking (see Table 16). The overall proportion of positive responses was similar, but fewer were in the "very positive" category (27.6%) than in either the middle school subgroup (32.2%) or the high school sample (31.0%). This group also had the greatest proportion of persons indicating some concerns (21.2%) versus 17.8% and 16.1% respectively in the other two groups.

The concept of fast-tracking was viewed comparably across career level categories, with a few noteworthy differences.

Table 18

Percentage Responses Concerning Concept of Fast Tracking, by Grade Level and Career Level

	Totals	Very Positive	Generally Favorable	Some Concerns	Strong Reservations	No Response
Grade Level						
Elementary	293	27.6	36.9	21.2	6.8	7.5
Middle School	298	32.2	36.2	17.8	5.7	8.1
High School	448	31.0	34.2	16.1	8.3	10.5
Eligible Career Level						
Probationary	26	7.7	42.3	26.9	0.0	23.1
Apprentice	19	15.8	31.6	31.6	10.5	10.5
Level I	229	38.0	34.5	17.9	4.4	5.2
Level II	186	30.6	42.5	17.2	5.4	4.3
Level III	497	31.2	35.0	16.1	9.1	8.7
No Level Given	82	14.6	24.4	25.6	8.5	26.8
Statewide	1039	30.4	35.5	18.0	7.1	9.0

Those at Apprentice and Level III status tended to have more strong reservations (10.5% and 9.0%) than those eligible for Levels I or II (4.4 % and 5.4% respectively). The respondents eligible for Level I gave the highest percentage of very positive ratings, 38.0%, versus 30.6% and 31.2% for Levels II and III.

In order to determine respondents' experience base for identifying strengths and weaknesses they were asked to indicate for each of the five choices whether or not they had selected that option. The procedures established by the Interim Certification Commission allowed applicants to try an alternative route to fast-track if a first attempt was unsatisfactory. Many teachers chose to take the staff development package even though they had used another option as their actual fast-track method. Some of those taking the NTE found that through an administrative interpretation of the legislated evaluation procedure they were also required to take the state's Career Ladder Test if applying for Levels II or III.

Results concerning the specific fast-track options are presented in Table 17. Staff development was the most commonly chosen response, with 44.3% participating. Next in order of preference were the Career Ladder Test (32.6%), NTE Specialty Area Test (16.6%) and NTE Core Battery (10.2%). Only 8.2% chose full evaluation, a result understandable in terms of the length and complexity of this option versus the others. Persons completing their fast-track requirements during the fall were eligible to receive half of their bonus checks in

January, a factor likely to have made short term options even more desirable.

There was considerable variability among the eighteen divisions of the state in terms of response to fast-track options. For example, percentages choosing the NTE Core Battery ranged from 28.6% in the First Tennessee District-Council 1 to 4.3% in East Tennessee District-Council 2 to 5.1% in Mid-Cumberland District-Council 2. In some areas, such as East Tennessee District-Council 2, those taking the Career Ladder Test accounted for as many as 65.9% of those responding. In other districts, the Career Ladder Test was the choice of as few as 8.9% of the sample from their respective area (Northwest-District Council). Staff development, as noted above, was the most popular and accounted for over 20% of the responses in all districts. It was most widely chosen in the Northwest District-Council (78.6%) and the Mid-Cumberland District-Council 1 (66.7%), and least chosen in the Memphis Delta District-Council 2 (22.7%). The final option, full evaluation, was chosen by more than 10% in only three districts: East Tennessee District-Council 1 (14.1%), Southeast District-Council 2 (12.7%) and Metro Council (24.0%). Metropolitan Nashville has had for several years a comprehensive evaluation process similar in many ways to that required by the state program. Findings across grade levels were consistent with those statewide (see Table 16).

At each grade level, staff development was the most popular

choice (see Table 16). It was selected by 51.9% of elementary, 45.6% of middle school, and 38.4% of high school respondents at the time of the survey. Full evaluation was the least preferred option, chosen by more high school teachers (10.3%) than elementary or middle school teachers (5.5% and 7.7% respectively).

Analysis by eligible career levels was also conducted (see Table 17). Several Probationary and Apprentice Level teachers reported having taken the NTE tests and other options, but this would not necessarily have been in context other than their actual applications for level I status, since they were presumably not yet eligible for the Level in terms of experience requirements.

Respondents eligible for Level III chose the NTE Core Battery less often (7.2%) than those with Level I or II eligibility (10.0% and 12.9%). Results were consistent across the three career levels for percentages selecting the Career Ladder Test option, but showed some variation for the staff development option. Responses ranged from 50.5% of Level II-eligible teachers to 41.9% of those eligible only for Level I. Full evaluation was chosen by a slightly higher percentage (10.3%) of those eligible for Level III than Level I or II (6.6% and 7.0%) respondents.

Evaluation

The final major section of the survey pertained to the

statewide evaluation process itself. Two general questions were asked, followed by specific responses concerning each of the seven evaluation data sources used for the state's evaluation of Level II and III applicants. Local school system evaluation according to state-approved procedures is a provision of the Tennessee program for those at or below Level I eligibility.

Respondents were first asked to indicate their views regarding the concept of a statewide evaluation process for teachers. Response options were: very positive (VP), generally favorable (GF), some concerns (SC) and strong reservations (SR). Overall, only 7.0% felt very positive, while 22.2% generally favored the concept (see Table 19). On the other hand, 64.9% expressed either some concerns (39.2%) or strong reservations (25.7%). Thus, the idea of having a statewide teacher evaluation process was not well received, apart from any specific pattern of implementation. In selected districts of the state, results were very strongly negative, such as Mid-Cumberland District-Council 1 (85.7% negative, including 57.1% strong reservations), and Memphis Delta District-Council 2 (77.3% negative). Among the most favorable to the idea was the East Tennessee District-Council 2 (36.8% favorable).

Responses across grade levels and eligible career levels were generally consistent with overall findings (see Table 19). Elementary teachers were somewhat less favorable than the middle and high school levels (24.6% overall positive

Table 19

Percentage Responses Concerning Concept of a Statewide Teacher Evaluation Process, by Grade Level and Career Level

	Totals	Very Positive	Generally Favorable	Some Concerns	Strong Reservations	No Response
Grade Level						
Elementary	293	3.8	20.8	43.3	28.0	4.1
Middle School	298	7.7	24.5	40.3	22.8	4.7
High School	448	8.7	21.7	35.7	26.1	7.8
Eligible Career Level						
Probationary	26	19.2	19.2	42.3	11.5	7.7
Apprentice	19	10.5	26.3	52.6	10.5	0.0
Level I	229	7.9	25.8	45.9	18.3	2.2
Level II	186	9.1	26.3	40.9	21.5	2.2
Level III	447	5.8	20.1	36.0	32.0	6.0
No Level Given	82	2.4	15.9	31.7	25.6	24.4
Statewide	1039	7.0	22.2	39.2	25.7	5.9

responses versus 32.2% and 30.4%). Teachers eligible for Level III status gave fewer positive responses (either "generally favorable" or "very positive") than the other career level teachers, and their responses most often indicated strong reservations (32.0%). By contrast, only 10.5% of the Apprentice group, 11.5% of Probationary and 18.3% of Level I had such serious reservations about the concept.

A second question dealt with how familiar respondents were with the ways local school system evaluation fits in with the Career Ladder Program. This question was important because only Level II and III applicants or those seeking a state-level review of an unfavorable local evaluation would actually be evaluated by the state. Results showed that a majority of the sample felt generally familiar (45.5%) or very familiar (15.5%) with the local/state "fit". These results were generally consistent with grade-level breakdowns (see Table 20). Middle school teachers somewhat less often felt very familiar with this aspect of the program (12.4%), while Level II teachers reported the greatest degree of familiarity.

The third part of the evaluation section asked respondents to indicate whether or not they had experienced each of the seven data sources included in the state process (see Table 21). Strengths and weaknesses were then to be provided, as detailed in the discussion of comments. Some respondents indicated experience with a particular data source through other than the state evaluation process, since they would not

Table 20

Percentage Responses Concerning Familiarity with Fit Between Local and State Evaluation, by Grade Level and Career Level

	Totals	Very Familiar	Generally Familiar	A Little Familiar	Not at All Familiar	No Response
Grade Level						
Elementary	293	17.7	40.6	32.4	5.5	3.8
Middle School	298	12.4	52.0	23.5	9.1	3.0
High School	448	16.1	44.4	22.5	9.6	7.4
Eligible Career Level						
Probationary	26	7.7	26.9	50.0	11.5	3.8
Apprentice	19	10.5	42.1	36.8	10.5	0.0
Level I	229	12.2	48.5	28.8	7.9	2.6
Level II	186	19.9	48.9	24.2	4.8	2.2
Level III	497	16.5	46.5	23.5	8.9	4.6
No Level Given	82	12.2	30.5	22.0	12.2	23.2
Statewide	1039	15.5	45.5	25.6	8.3	5.1

Table 21

Percentages of Total Sample Responses Indicating Evaluation Data Sources Experienced by Respondents

Evaluation Data Source	No Response	Yes	No
Classroom Observation	7.5	45.1	47.4
Student Questionnaire	11.2	5.7	83.2
Peer Questionnaire	10.2	17.7	72.0
Principal Questionnaire	11.0	22.3	66.8
Professional Skills Test	9.9	28.5	61.6
Candidate Interview	12.3	6.8	80.8
Portfolio	13.0	4.1	82.8

N = 1039

in all cases have been visited by the state evaluation teams. However, response patterns are still indicative of first-hand experience with the data sources they were asked to assess.

The most frequently experienced evaluation data source was classroom observation, reported by 45.1% of the sample. The Professional Skills Test was reported by 28.5% and an interview with one's principal by 22.3% of the respondents. Fewer than 7% percent had experienced student questionnaires, personal interviews, or portfolios. (The Career Ladder Program was set up so that portfolios were only being reviewed after February, 1985 to allow for further evaluator training).

There was considerable consistency across districts as to teachers having experienced the classroom observation component. Responses in a few cases departed substantially from the overall percentage, such as the Northwest District Council (85.7%) and the First Tennessee District-Council 1 (66.7%). In no case did the percentage fall below 32.5%. Results concerning student questionnaires were also comparable across districts, with very little experience reported. Responses indicating experience with peer questionnaires ranged from 32.3% in the South Central District-Council 1 to 6.8% in the Memphis Delta District-Council 2. The latter district was also lowest in terms of percentages reporting contact with principal questionnaires as part of the evaluation process (6.8%).The high percentage in this category was 33.9% (Northwest District).

There was considerable variability in the responses concerning the Professional Skills Test as a data source. While the statewide sample reflected a 28.5% experience level, district results ranged from 58.1% in the South Central District-Council 1 to 10.4% in the Metro (Nashville) Council. The candidate interview, which was dropped early in 1985 by action of the Interim Certification Commission and the State Board of Education, was a data source experienced by no more than 14% of any district's respondents at that time. Similarly, the portfolio was consistently a data source not yet directly used with most survey respondents.

Grade level analyses were conducted for each evaluation data source (see Table 22). These revealed generally consistent experiences across grade level divisions as compared to overall results.

When broken down by eligible career levels (see Table 23) results indicated more experience with classroom observation by Probationary and Apprentice Level teachers (57.7% and 57.9%), with a range of 40.6% (Level I) to 54.8% (Level II) in the other groups. Responses were generally consistent in regard to student questionnaires, with the greatest experience reported by Level II-eligible teachers (8.6%). This subgroup was also highest in terms of experience with the peer questionnaire (26.9%), while beginning teachers had little experience with this data source (3.8% for Probationary and 5.3% for Apprentice). Level II teachers also showed the highest percentages for principal questionnaires (30.6%) for the Professional Skills

Table 22

Percentage Responses Concerning Evaluation Data Sources by Respondents' Grade Levels

Evaluation Data Source	Experience With This Source		
	No Response	Yes	No
Classroom Observation			
Elementary	5.5	45.4	49.8
Middle School	6.4	52.3	41.3
High School	9.6	40.2	50.0
Student Questionnaire			
Elementary	9.2	3.1	87.7
Middle School	9.1	8.4	82.6
High School	13.8	5.6	80.6
Peer Questionnaire			
Elementary	7.8	16.0	76.1
Middle School	8.7	22.1	69.1
High School	12.7	15.8	71.2
Principal Questionnaire			
Elementary	8.2	20.8	71.0
Middle School	9.7	26.2	64.1
High School	13.6	20.8	65.8
Professional Skills Test			
Elementary	7.5	25.6	66.9
Middle School	8.7	32.2	59.1
High School	12.3	27.9	59.8
Candidate Interview			
Elementary	10.2	5.1	84.6
Middle School	10.1	7.0	82.9
High School	15.2	7.8	77.0

Table 22 (continued)

Percentage Responses Concerning Evaluation Data Sources by Respondents' Grade Levels

Evaluation Data Source	Experience With This Source		
	No Response	Yes	No
Portfolio			
Elementary	9.9	5.1	85.0
Middle School	11.4	3.7	84.9
High School	16.1	3.8	79.9

N=Elementary 293, Middle 298, High School 448

Table 23

Percentage Responses Concerning Evaluation Data Sources by Respondent's Career Level Eligibility

Evaluation Data Source	Experience with this Source		
	No Response	Yes	No
Observation			
Probationary	3.8	57.7	38.5
Apprentice	0.0	57.9	42.1
Level I	6.6	40.6	52.8
Level II	5.9	54.8	39.8
Level III	6.2	45.1	48.5
Not Given	24.4	29.3	47.6
Student Questionnaire			
Probationary	3.8	3.8	92.3
Apprentice	0.0	0.0	100.0
Level I	8.7	6.6	84.7
Level II	9.7	8.6	81.7
Level III	11.7	4.8	83.5
Not Given	23.2	3.7	73.2
Peer Questionnaire			
Probationary	3.8	3.8	92.3
Apprentice	0.0	5.3	94.7
Level I	9.6	10.0	80.3
Level II	8.1	26.9	65.1
Level III	9.9	20.9	69.0
Not Given	23.2	6.1	70.7
Principal Questionnaire			
Probationary	0.0	11.5	88.5
Apprentice	0.0	10.5	89.5
Level I	9.6	17.0	73.4
Level II	9.1	30.6	60.2
Level III	10.9	23.7	65.6
Not Given	25.6	15.9	58.5

Table 23 (continued)

Percentage Responses Concerning Evaluation Data Sources by Respondent's Career Level Eligibility

Evaluation Data Source	Experience with this Source		
	No Response	Yes	No
Professional Skills Test			
Probationary	3.8	0.0	96.2
Apprentice	0.0	5.3	94.7
Level I	8.3	24.5	67.2
Level II	9.1	33.9	57.0
Level III	9.5	31.6	59.0
Not Given	23.2	23.2	53.7
Candidate Interview			
Probationary	3.8	3.8	92.3
Apprentice	0.0	5.3	94.7
Level I	10.5	3.5	86.0
Level II	9.7	13.4	76.9
Level III	12.9	6.6	80.5
Not Given	25.6	3.7	70.7
Portfolio			
Probationary	3.8	3.8	92.3
Apprentice	0.0	0.0	100.0
Level I	10.5	1.7	87.3
Level II	11.8	4.8	83.3
Level III	13.3	5.4	81.3
Not Given	26.8	2.4	70.7

N=Elementary 293, Middle 298, High School 448

Test (33.9%), and for the Candidate Interview (13.4%). Level III-eligible teachers were next in percentage of experiences with peer questionnaires (20.9%), principal questionnaires (23.7%), Professional Skills Test (31.6%), and Candidate Interview (6.6%). Teachers with fewer years of experience also reported less contact with the various data sources except classroom observation, as noted above. At all stages of career level eligibility, the portfolio had been experienced least often under any system of evaluation.

Comments

The following subsection of this chapter focuses on the written responses. Teachers were provided space on the survey to respond with strengths and weaknesses concerning the communication, fast-tracking, and evaluation aspects of the Career Ladder.

Teachers responding to the survey were given the opportunity to comment on the quality of communication and its sources. The first source mentioned was the State Department (Nashville Staff). Of 109 comments, 78.0% indicated that information from this source was not useful in that it was late, inaccurate, unclear, or changing (see Table 24). Only 5.5% of the comments concerning the Nashville Staff indicated that this source was helpful.

Respondents also commented on the State Department (District Office) Communication,with 8.9% in the "helpful" category.

Table 24

Percentage Response of Teachers' Comments on Communication Regarding the Career Ladder

Communication Source	Rating*				
	1	2	3	4	N
State Dept.-Nashville Staff	5.5	78.0	0.0	15.6	109
State Dept.-District Office	8.8	91.2	0.0	1.5	34
State Dept.-Mailings	7.6	90.9	0.0	5.6	66
Evaluators for Career Ladder	8.3	77.8	8.3	5.6	36
School System Central Office	34.2	53.7	9.8	2.4	41
Principal	46.0	37.8	13.5	2.7	37
Peers	18.2		9.1	4.6	22
Teachers' Study Council	44.4	39.0	11.1	5.6	18
TEA Staff/Representatives	66.7	33.3	0.0	0.0	30
TEA Mailings	56.3	40.6	3.1	0.0	32
News Media	10.0	90.0	0.0	0.0	30

*1. Helpful (e.g. sent mailings, held workshops)

2. Not useful (e.g. information, late, inaccurate, unclear or changing)

3. Positive Availability (e.g. reachable and willing to answer questions)

4. Negative availabity not able to reach by phone or otherwise

N = number of comments made

Another 91.2% of comments indicated that this source was not useful (see Table 24).

Comments on the State Department mailings were similar to those concerning the Nashville Staff and District Office, with 90.9% in the "not useful" category (see Table 24).

Teachers were also negative in their comments about the Evaluator for Career Ladder as an information source. Of these comments, 77.8% indicated that this communication was not useful (see Table 24).

Comments on the school system (Central Office) as a source of information were somewhat less negative than the comments on State Department communication. Of these, 54.7% indicated that the Central Office was "not useful". However, a significant percentage (34.5%) indicated that this source was helpful (see Table 24).

Teachers' comments on the principal as a source of information were more positive with 46.0% showing this to be a helpful source (see Table 24). However, a considerable number (37.8%) of comments concerning communication from the principal indicated that this was not useful.

Concerning their peers, teachers' comments were generally unfavorable, with 18.2% in the "helpful" category and 68.2% in the "not useful" category (see Table 24).

Fewer teachers commented on the Teachers' Study Council than on any other source of communication. However, of the comments, 44.4% were favorable, with 38.9% indicating that

this information was "not useful" (see Table 24).

Generally, teachers were also favorable in their comments about TEA Staff Representatives. Of these comments, 66.7% described the TEA Staff Representatives as a helpful source (see Table 24). The remaining 33.3% ranked this communication "not useful".

On the topic of TEA Mailings many teachers' comments indicated this source as "helpful" (56.3%). Yet 40.4% were more negative, rating TEA Mailings as "not useful" (see Table 24).

Comments on the News Media Communications were largely negative, with only 10% considering it was helpful, and 90% of the comments indicating this source to be "not useful" (see Table 24).

In the Fast-Track portion of the survey respondents were given the opportunity to list strengths and weaknesses of each option. The first option listed was the NTE Core Battery. Comments concerning test content were almost equally divided with 13.0% positive and 14.3% of the comments indicating weaknesses in NTE Core Battery content (see Table 25). The largest percentage of comments in this category (60.3%) were those stating that the NTE Core Battery was not appropriate for its purpose.

Comments concerning NTE Specialty Area were similar to the Core Battery, although the percentages differed somewhat. Of these comments 25.3% indicated positive feelings toward

Table 25

Percentage Response of Teachers' Comments on Fast-track Process of Career Ladder--National Teachers Exam

	Rating*							
	1	2	3	4	5	6	7	N
NTE Core Battery	13.0	14.3	1.2	1.9	60.3	1.9	7.5	161
NTE Specialty Area	25.3	16.7	0.7	4.0	46.0	4.0	3.3	150

*1. Positive as to test content

2. Negative as to test content

3. Negative as to testing conditions

4. Appropriate for purpose

5. Not appropriate for purpose

6. Positive as to length

7. Negative as to length

N = number of comments made

test content, while 16.7% were negative. Again, a large percentage (46%) of all comments about the NTE Specialty Area reflected the sentiment that the test was not appropriate for its purpose.

Another fast-track option, the Career Ladder Test, received many comments. Of these 11.3% were negative statements dealing with test content and 10.3% were negative comments concerning preparation and terminology (see Table 26). The largest number of comments, 54.7%, indicated that the Career Ladder Test was not appropriate for its purpose.

More teachers commented on the Staff Development option than any other item on the survey. Of these 237 comments, 15.6% said Staff Development should be a part of college curriculum, and 10.6% of the comments reflected the opinion that this option was not appropriate, too long, too restrictive, or too repetitious (see Table 27). However, a large percentage, 57.8% stated that Staff Development was appropriate, good for classroom use, helpful for teachers, or was good training.

Comments concerning Full Evaluation as a fast-track option were divided fairly evenly among the five categories (see Table 28). Of these, 14.9% were negative statements concerning procedure (poor evaluators and uncertainty about requirements). An equal number (14.9% of the comments) were positive indicating that the Full Evaluation was appropriate in terms of feedback, observation, and objectivity. In addition, 16.1% of the statements were positive in regard to instrument construction

Table 26

Percentage Response of Teachers' Comments on Fast-tracking Process of Career Ladder--Career Ladder Test

	Rating*													
	1	2	3	4	5	6	7	8	9	10	11	12	13	N
Career Ladder	3.0	11.3	7.4	1.9	54.7	3.5	1.5	1.0	3.0	0.5	0.5	1.5	10.3	203

*1. Positive as to test content

2. Negative as to test content

3. Negative as to testing conditions

4. Appropriate for purpose

5. Not appropriate for purpose

6. Positive as to length

7. Negative as to length

8. Positive as to professional skills portion

9. Negative as to professional skills portion

10. Positive as to reading/writing portion

11. Negative as to reading/writing portion

12. Positive as to preparation/terminology

13. Negative as to preparation/terminology

N = number of comments made

Table 27

Percentage Response of Teachers' Comments on Fast-track Process of Career Ladder--Staff Development

	Rating*						
	1	2	3	4	5	6	N
Staff Development	57.8	10.6	1.7	8.9	5.5	15.6	237

*1. Appropriate (e.g. good for classroom use, helpful for teachers, good training)

2. Not appropriate (e.g. too restrictive, too long, too repititious)

3. Conflict with other fast-track option or personal commitment

4. Positive as to training sessions

5. Negative as to training sessions

6. Should be part of college curricululm

N = number of comments made

Table 28

Percentage Response of Teachers' Comments on Fast-track Process of Career Ladder--Full Evaluation

	Rating*								
	1	2	3	4	5	6	7	8	N
Full Evaluation	16.1	3.5	2.3	14.9	14.9	21.8	1.2	25.3	87

*1. Positive as instrument construction and content

2. Negative as to instrument construction and content

3. Positive procedure (e.g. good evaluators, well defined criteria)

4. Negative procedure (e.g. poor evaluators (inexperienced), uncertainty of requirements)

5. Appropriate (e.g. gave useful feedback; observations were objective)

6. Inappropriate (e.g. subjective, too rigid, cannot assess real teaching)

7. Positive as to time factor

8. Negative as to time factor

N = number of comments made

and content. Other significant percentages of negative comments were in the categories of time factor (25.3%) and inappropriateness (21.8%).

Teachers also commented on strengths and weaknesses of the various elements used in the Career Ladder evaluation process. The first of these was Observation of Classroom Performance. Of the 187 comments on this topic, 33.7% were positive, stating that this form of evaluation was appropriate, serves a purpose, provides useful feedback, and/or is objective (see Table 29). However, a significant number, 20.3%, rated this as a poor measure of teaching. 13.4% stated that classroom observation was inappropriate, a waste of time, too subjective, or of no real purpose. An additional 10.2% indicated that it was poorly implemented.

Concerning the student questionnaire, teacher comments revealed that 34.9% considered the questionnaire was inappropriate. Another 34.1% of the statements showed the questionnaire to be a poor measure of teaching. However, 20.5% of the comments were positive in terms of student questionnaire appropriateness.

Of the comments about the Peer Questionnaire, 37.4% labled this a poor measure of teaching and 27.9% as inappropriate. Of the teachers who responded to the Peer Questionnaire, 21.8% thought this method was appropriate

Of the teacher responses to the Principal Questionnaire, comments were nearly equally divided between positive and

Table 29

Percentage Response of Teachers' Comments on Evaluation Process of Career Ladder

Evaluation Component	Rating*									
	1	2	3	4	5	6	7	8	9	10
Observation	33.7	13.4	0.0	4.3	2.7	20.3	4.8	1.17	9.6	10.2
Student Questionnaire	20.5	23.9	0.0	0.0	0.8	34.1	1.5	0.0	4.6	3.8
Peer Questionnarie	21.8	27.9	0.7	0.7	2.7	37.4	0.7	0.7	4.8	2.7
Principal Questionnaire	27.2	22.3	0.0	2.9	18.5	23.3	0.0	0.0	2.9	2.9
Professional Skills Test	7.4	28.2	0.0	2.7	0.7	45.0	1.3	2.7	9.4	2.7
Candidate Interview	12.1	20.7	0.0	13.8	0.0	12.1	1.7	6.9	20.7	12.1
Portfolio	3.4	20.6	0.0	39.0	0.0	18.5	1.4	0.7	11.6	4.8

*1. Appropriate (e.g. serves purpose, provides useful feedback, objective).
2. Inappropriate (e.g. misuse of time, too subjective, no real purpose).
3. Positive as to time
4. Negative as to time
5. Appropriate measure of teaching
6. Inappropriate measure of teaching
7. Positive experience
8. Negative experience
9. Good idea
10. Poorly implemented

negative. Twenty-seven percent of the responses indicated that this was an appropriate method of evaluation, and 18.5% said it was a good measure of teaching. On the negative side, 23.3% indicated that the Principal Questionnaire was a poor measure of teaching, while 22.3% of the comments expressed the opinion that it was inappropriate for its purpose.

Comments about the Professional Skills Test were largely negative, with 45.0% indicating that the test was a poor measure of teaching and 28.2% calling it inappropriate.

Candidate interview responses were largely negative also, although distributed among several categories. Twenty-one percent of the comments indicated that this method of evaluation was inappropriate while 13.8% reported it to be a negative use of time, and 12.1% a poor measure of teaching. Twelve percent also indicated that the candidate interview was poorly implemented. Of the positive remarks, 20.7% conveyed the view that the candidate interview was a good idea and 12.1% said that it was an appropriate method of evaluation.

Teacher responses to the Portfolio as an instrument of evaluation were mainly negative with 39.0% indicating that the portfolio was a negative use of time, 20.6% stating that it was an inappropriate method, and 18.5% finding it to be a poor measure of teaching. Only 11.6% of the comments expressed the feeling that the portfolio was a good idea.

The survey findings reported above represent the views of over 1,000 Teachers statewide. They provide a substantial

information base for understanding how the Career Ladder Program had affected teachers as of mid-year, 1984-85. Perceptions reported regarding the evaluation process, the fast-tracking system, and th enature of communication were indicative of serious concerns about the program developed for Tennessee Teachers. Knowledge of these concerns as well as the elements found to be satisfactory can be used to make needed improvements during the next cycle of implementation. It will be of interest to monitor changes in these experiences and perceptions as greater numbers of teachers complete the full evaluation process and learn of the Career Ladder status they had earned as a result.

CHAPTER V

Career Ladder Legislation in the 1985 Tennessee General Assembly

Introduction

The passage of the Comprehensive Education Reform Act (CERA) during the 1984 Special Session of the Tennessee General Assembly was lauded by many as a significant advance and necessary improvement of the state's education system. Proponents envisioned the Career Ladder portion of the Act as a means to improve the quality of the state's teachers and consequently its students. However, under the 1984 bill, key details of its implementation were not finalized. Also unsolved, despite the Governor's successful campaign to fund the program with a one cent sales tax increase, was the dilemma of how to provide an adequate revenue base for the program and for other state services in the years ahead. There were still several technical problems in the bill, revealed by conflicts that arose early in the plan's implementation.

The sponsors of CERA looked to the 1985 legislative session as an opportunity to discuss needed changes and revise the bill. Proponents suggested several specific technical changes that they felt would improve the bill. They also recognized that other parties might use the revision process as a means of making substantive changes in the legislation.

The Tennessee Education Association (TEA), although now an announced supporter of the bill for the benefits that it could provide the state's teachers, was still wary of several features,

particularly in the evaluation process. The TEA also objected to the fact that the bill was heralded by some of its proponents as a complete reform of the state's education system. "Unfortunately the Comprehensive Education Reform Act of 1984 fails to address some of the biggest obstacles to better schools," TEA Executive Secretary Cavit Cheshier said in the March 1985 edition of the teacher publication Tennessee Teacher (March 1985). Cheshier cited other areas of education that TEA felt were in need of legislative attention such as class size reduction, better funding for school supplies, and teacher health insurance. Despite their interest in other education issues, TEA representatives made known their intention to be actively involved in the revision process of CERA early in the 1985 session.

This chapter reviews the legislative process affecting CERA during the 1985 session. The events leading up to the session are also noted, including an analysis of the figures and organizations that would play key roles in the continuing debate over the legislation. The 1985 bill introduced to revise CERA is discussed, including the negotiations that led to proposed changes. Also included is a discussion of other significant education legislation introduced this session and its relationship to CERA. In conclusion, Tennessee's fiscal situation and 1985 tax reform legislation are examined, including how they affected both CERA and other education reforms.

Events Leading Up to the 1985 Session

Due to the tremendous political debate that characterized passage of CERA in 1984, the far-reaching changes it proposed for the teaching profession in Tennessee, and the still uncertain details of its implementation, the fate of CERA remained undetermined prior to the 1985 Session. The Governor recognized that the education reform effort was indeed incomplete and reminded the press, public and legislature in his January, 1985 State of Education Address before the Tennessee Press Association that close attention to the program must continue, particularly regarding its funding. The one cent sales tax increase proposed in 1984 would expire in June 1985 unless extended by the legislature. In addition, the General Assembly had voted to repeal the sales tax on food during the 1984 session. Unless reversed, this would mean a substantial loss in revenue for the state and consequently for the education program.

As the program entered the beginning stages of its implementation, proponents recognized its vulnerability to attack from critics that would like to see it fail, or at least undergo major revision during the legislative session. According to Alexander spokesman John Parrish, the Governor therefore devoted, "more than half of his working time to education issues to ensure that the Better Schools Program would work." According to Parrish the Governor expressed his view that, "The fact that the legislature passed it does not mean he'll sit back and let it rest on its laurels. He wants to make sure that the program is so secure by the time he leaves office that nobody would want to do anything to change it by the time he's gone." ("No School," 1984).

Legislative proponents were also determined to put the 1984 legislation in the best shape possible. In the form of House Bill 846/Senate Bill 872, Representatives Steve Cobb and Shelby Rhinehart, and Senators Leonard Dunavant and Riley Darnell proposed to clean up the loose ends of the 1984 CERA.

The Development of the Revision Bill

Representative Cobb commented that as legislators entered the 1985 session, he and other sponsors worked diligently to avoid controversy. Cobb believed that much of the often heated debate over the bill during the 1984 session only resulted in "the development of problems where none before existed" (R. Miller, personal communication, May 7, 1985). The strategy that he and other sponsors mapped out for the technical reforms they planned to propose in 1985 was one of compromise and open negotiation. Cobb attributed many of the problems that arose in earlier negotiations over the program to the fact that TEA was inadequately informed of, and virtually excluded from, the decision making and planning processes of the original bill.

In order to avoid the controversy and antagonism that marred the introduction of the original bill, the sponsors of the revision bill took care to include TEA representatives in a series of informal discussions of the proposed legislation. The proposed changes in CERA evolved from meetings among the bill sponsors, Commissioner McElrath, representatives of the administration, the TEA and several other interested legislators. (Democratic Caucus Legislative Report, April 11). The bill that was proposed from these discussions was

what one sponsor termed "a combination of technical changes and some improvements to deal with the few minor problems the new education program has encountered during its implementation." (Democratic Caucus Legislative Report, March 21). According to Representative Cobb, "Two-thirds of the bill truned out to be technical changes and one third of the bill was TEA suggestions for improvement" of CERA (R. Miller, personal communication, May 27, 1985).

CERA Revisions

The TEA found two sections of the original bill particularly objectionable, both pertaining to evaluation. Section one of the bill dealt with the evaluation of non-Career Ladder teachers in their local school systems. The status of those who chose not to enter the Career Ladder Program was a great concern of the TEA. Under the original bill, non-Career Ladder teachers would undergo evaluations similar to Career Ladder teachers, but conducted exclusively by local evaluators and without pay incentive provisions.

TEA's concern was that the bill did not indicate that local school boards should involve teachers in the development of the evaluation procedures. Without any input in the development process, TEA contended that teachers would not know the skills expected of them. The revision legislation contains a provision that allows some input in the local evaluation planning for non-Career Ladder teachers.

The second section that sparked controversy, section 31, addressed a particularly sensitive area with the TEA: the issue

of peer review. TEA Assistant Executive Secretary and chief lobbyist Betty Anderson expressed the organization's view on this issue. "TEA strongly believes in the philosophy that teachers should teach, while any necessary evaluation should be performed by administrators." (R. Miller, personal communication, May 29, 1985). TEA asserts that peer review negatively influences teacher morale and adversely affects working relations among fellow teachers.

Under the 1984 bill, the local evaluation teams would be used to evaluate Probationary, Apprentice, and Career Level I teachers. These could include a teacher within the same school as the teacher being evaluated. Under the 1985 bill, outside evaluators could be provided by the local school systems or the State Certification Commission upon request. Specifically, the section now outlines that the local evaluation team consist of (1) The evaluatee's principal, and (2) Another professional employee recommended by the evaluatee and approved by the evaluating principal.

In addition to these two changes of particular concern to the TEA provisions of the new bill provide the following:

> 1. Places discretionary control of supplements for second, third and fourth year teachers waiting for eligibility for Career level I in their fifth year with the Tennessee Foundation Program. This funding was provided in an amendment to the 1984 bill called the "Hamilton Amendment".

Negotiators agreed that the funds would be more expeditously handled if transferred to this program for disbursement.

> 2. Establishes a payment scale for rewarding outstanding performance for teachers and administrators who were employed on eleven and twelve month contracts before entering the Career Ladder Program.

This revision, termed the "merit pay provision", stipulates that Level II teachers and Level I administrators with eleven month contracts would receive $2,000. Level III teachers would receive $ 3,000. Level III teachers and Level II administrators with twelve month contracts would receive $3,600 in order to offset local costs for compensation for the extra months of service. The state would send local education agencies the difference between the overall supplement paid career ladder educators and the amount received by the educator for outstanding performance.

3. Provides for limited continuation of the "fast track" provision for administrators.

This section calls for the payment of a $1,000 supplement to administrators until they can become available for Career Level I to be continued, but for a limit of three years.

4. Extends the so-called "Toe in the Water" provision to include part time teachers and administrators.

This provision in the original bill allowed teachers to experiment and enter the Career Ladder Program with the option of dropping out one time.

5. Removes in-service training as a required component in the evaluation of Probationary, Apprentice and Career Level I teachers.

This was another area that particularly concerned educators. They felt that it was virtually impossible to evaluate in-service training. To minimize conflict, the provision was removed.

6. Provides for full payment for 1985-86 educators who applied for upper levels on the career ladder prior to November 30, 1984 and who complete the certification requirements no later than the end of the 1985-86 school year. Also allows for the payment of Career Ladder supplements the year following

evaluation for all educators who applied after November 30, 1984.

This technical revision, favored by the administration and the State Department of Education, would make it easier to budget for the program by evaluating the previous years' allotments.

7. Allows supervisors, assistant principals and principals employed after July 1, 1984 to use all experience as an administrator in calculating eligibility for the administrator's Career Ladder.

This section authorizes these administrators to transfer their precareer ladder work experience.

8. Extends to administrators certain protections and rights in the evaluation process already guaranteed for teachers in the 1984 bill. These are:

--permits administrators to "bump" one member of the evaluation team if they choose.

--requires that evaluations of administrators be open for inspection by the administrator or his/her designated representative.

--specified procedural rules for administrators, including a pre-evaluation interview, multiple observations, a post evaluation conference, and an opportunity for the administrator to respond in writing to the written evaluation.

9. Requires administrators to meet more specific competencies prescribed by the State Board of Education for the position for which they are seeking certification.

10. Deletes the requirement that the supervisors employed after July 1, 1984 have eight years experience as an elementary and secondary teacher in order to be eligible for a provisional certificate, and substitutes the requirement of five years of service, the nature of which shall be determined by the State Board.

11. Extends the Career Ladder eligibility beyond teachers, principals, assistant principals, and supervisors to other professional persons for whom job descriptions are recommended by the State Certification Commission and approved by the State Board.

12. Allows teachers with out-of-state experience to obtain a temporary teaching certificate upon employment in Tennessee. The certificate would be valid up to two years until that individual is evaluated and his/her placement on the Career Ladder is determined.

13. Requires the Local Education Agency to recommend the Apprentice certificate for those eligible if they have received a positive evaluation under an approved local evaluation plan.

14. Allows teachers to count toward certificate renewal upper division courses in areas of need identified through the evaluation process if written verification of the need is signed by the teacher's immediate supervisor and attached to the renewal application.

Previously teachers had to take courses in the area of their certification. This provision would allow teachers to apply other courses that they felt were needed toward their recertification requirement.

Sponsors of the revision bill maintained that it was a true compromise, encompasing the suggestions and input of all parties concerned about the CERA. For the most part, the TEA agreed that the bill answered most of their major questions about the legislation of the program at this point in its implementation. There was one issue though, which was not addressed in the revision bill despite TEA objections. This involved the use of so-called "paper and pencil" tests, or written examinations designed to measure fundamental academic and teaching skills.

Not unlike its counterpart organizations nationwide, the TEA has opposed the use of written examinations since the inception of the Career Ladder Program. The TEA contends its is not possible to test one's ability to teach through a written exam. However others maintain that these types of tests are useful because, if

carefully constructed, they can be accurate indicators of teaching ability. Proponents agreed that the "paper and pencil" type examinations would help protect the evaluation process from the politics that so often have accompanied past teacher evaluations.

Overall, those in the revision process appeared to view the changes made by Senate Bill 872/House Bill 846, as minor in scope relative to early expectations that the TEA would attempt a more comprehensive change. The TEA stressed the importance of the changes that were made, but agreed that the bill basically left the 1984 Act intact. A combination of several factors probably determined the "smooth sailing" of the bill through the legislature.

How the Bill was Passed

Legislative observers have attributed the ease with which the bill passed and the lack of controversy surrounding the revision process to early preventitive measures taken by legislative leadership, in particular House Speaker Ned Ray McWherter, serving an unprecedented seventh term as Speaker. McWherter's power and persuasive abilities have gained him much respect from his fellow legislators. In fact, his stance in favor of the Better Schools Program during the 1984 session may have been the most important factor that determined its passage.

McWherter's support for the program prompted him to call an unusual meeting with the House Committee on Education on February 13, 1985 in his office conference room, usually reserved for meetings with the legislative leadership. During the meeting, described as a "pep talk" by the Nashville media, the speaker reminded the

committee of the difficulties the program encountered during the 1984 session. McWherter expressed concern over the fact that membership on the Education Committee was not a popular choice of legislators this session. Legislative observers speculated that some lawmakers were not as interested this session because they felt the true battle over the CERA was over. Others, they theorized, hoped to avoid any further controversy that might arise during the revision of the bill.

McWherter cautioned legislators that the task of overseeing the implementation of the program could be even more difficult, than the passage of the orginal bill, and asked the Committee not to make major changes in the program until it was given the chance to get underway. "Let's not start changing the program until we get some experience with the program, " McWherter said (House Committee on Education Meeting, February 13, 1985). Another legislator offered a similar assessment of the revision process of CERA. "Although the changes are considered to be minor, the bill is significant because of the lack of controversy surrounding its passage. Few changes were made in the Act because officials decided to give the reforms a chance to take full effect" (Democratic Caucus Legislative Report, April 11).

The TEA acknowledged the influence of the leadership of McWherter, Cobb and others on the successful passage of the revision bill, but cited reasons of their own for not proposing major changes. According to TEA officials, the majority of the problems that the program has created for teachers stem from its implementation rather

than legislative flaws. Anderson and TEA President Donna Cotner explained that most of the serious problems encountered so far deal with how the Interim Commission interprets the legislation, not with how the legislation is written, and will have to be addressed once the program gets fully underway (R. Miller, personal communication, May 27, 1985).

Contoversy in the Implementation of CERA

A particular example of the problems TEA has had with the Interim Commission over the implementation of the program surfaced early in 1985 and concerned the development of rating scales for portions of the evaluation process. The responsibility for overseeing the implementation of the CERA Career Ladder remained with the Interim Commssion under the conditions set by the 1984 bill. The majority of the commission's duties through 1985 have concerned the design and oversight of the evaluation process for teacher assessment. Even more than their dislike for "paper and pencil" tests, the TEA strongly disapproves of subjective assessments of teacher progress, which may be skewed by the influence of personal or political bias within schools and school systems. The development of evaluation criteria, therefore, is an area which the TEA contends should be more open to teachers themselves.

The evaluation process developed by the Interim Commission was the result of extensive field research. Of the seven data sources used for assessment, two were to be evaluated on rating "scales": a personal interview and the presentation of a personal

portfolio of teaching material. The Interim Commission decided to keep the details of these rating scales confidential despite the objections of TEA members on the Commission who felt that this information was vital for teachers to be able to prepare for their interviews. The view of the majority of Commission members was that advance preparation was exactly what they were trying to avoid in this type of evaluation. These members felt that by keeping the scales confidential, unfair advantage of one teacher over another would be minimized.

Cotner and TEA officials irked the Commission by distributing sample rating scales to teachers at TEA-sponsored workshops designed to help teachers prepare for the evaluations. According to Cotner, "All teachers should have all of the information that deals with the teacher evaluations." She stated further that teachers' right of free access to this public information should not be abused. The result of this controversy was removal of the candidate interview as an evaluation data source, although approximately six hundred interviews had already been conducted. Weighting of the various other date sources was adjusted by the Commission shortly after this decision.

Other Educational Reforms of 1985

Following the controversy surrounding 1984's CERA, few expected that many other significant education reforms would be successfully legislated in the state in 1985. However, this proved to be what Representative Cobb termed, "an extraordinary year for teachers"

with the introduction and passage of several significant education bills (R. Miller, personal communication, May 27, 1985).

Although CERA was billed as a complete reform of education in Tennessee by the Alexander administration, many legislators as well as teachers maintained that there were still significant problem areas in education which remained unaddressed. According to TEA Executive Director Cavit Cheshier, "CERA was the product of a political storm and a nationwide reform movement that sold the public on solutions much too simplistic to solve our real problems. It was a start, but now that the dust has settled and there is still public interest in improving our schools, we need to take a more in depth look at what needs to be done" ("TEA Offers," 1985).

Using the philosophy that the education reform movement successfully focused attention on the problems of public shcools, the TEA took the initiative of developing a "School Improvement Package" suggesting other specific reforms. The TEA proposed this package to the media as its "top legislative priority" and challenged the legislature to address the items contained in the Package (Tennessee Teacher, March 1985).

The costly School Improvement Package, with a price tag estimated from $160 to $250 million, was quickly billed by the media as "TEA's wish list." ("TEA Proposes," 1985). The organization received considerable criticism with the introduction of the package. In effect, TEA critics maintained that the introduction of the package appeared to question the administration's judgement and

the worth of the reforms. However, the attention of some key legislators was focused on some of the proposals. The problem of providing adequate health insurance for teachers, for example, was billed by the TEA as "teachers' number one priority" and became the focus of much lobbying effort from the organization (R. Miller, personal communication, May 29, 1985).

Under the leadership of Representative Rob Stallings, Chairman of the House Agriculture Committee, a bill was introduced to address this area. Many of the state's local education associations provide insurance to their employees, but there are many school districts where teachers cannot obtain group health insurance. Insurance companies have generally turned down local education associations' requests for group insurance because of the insufficient number of teachers who would join the plan. In the bill proposed to address this problem, an insurance program would be set up to pool the local agencies under a single group insurance policy. The state would pick up a sizeable percentage of the cost for insurance. School districts which already have insurance would be offered the opportunity to join the plan or receive an equivalent increase in their state education funding.

The insurance bill passed after extensive debate in the House and Senate, but the major issue, how to fund the program, was not resolved until the last weeks of the session. Finally, both houses reached a compromise on an amendment to the appropriations bill which would fund the program 50% by state and local governments. The other portion of the funding would be generated by a reduction

in the teacher pay raise from five percent to four percent.

Another key education issue among TEA's proposals was a reduction in the pupil-teacher ratio. TEA officials indicated that while there is still a great debate among researchers about the ideal class size, their data suggest that learning is enhanced by smaller classes, especially in lower grades. Tennessee's present law requires first grade through third grade classes to maintain a 25 to one pupil-teacher ration. Waivers granted by the state allow classes to hold 10% above this number, up to 28 students.

The TEA proposal sponsored by Representative Paul Starnes, Chairman of the House General Welfare Committee, would reduce class size in grades K-6 by five students in 1985-86 and grades 7-12 in 1986-87 an estimated cost of over $160 million, according to legislative fiscal staff reports. Representative Cobb introduced a bill that would lower the pupil teacher ratio to 15 to one in first grades statewide at a cost of $42 million, according to legislative fiscal staff estimates. In light of the small likelihood that such a significant amount of funding could be appropriated, Cobb revised his bill. The revised version established a pilot program in select school systems across the state which would fund a reduction in class size to 15 pupils for a period of four years for select classes of kindergarten through third grade. Cobb's bill passed, though it did not receive the full funding that sponsors originally requested. Cobb's original request was for $6 million, while the bill was appropriated for $3 million.

A third education issue in 1985 dealt with a problem that

exists in some school systems where teachers are not given adequate planning time. Because of non-instructional demands on their time, such as lunch time disciplinary supervision, teachers favored a proposal for "duty free lunches". A bill which addressed this problem successfully passed the legislature at a cost of $1.6 million. To many proponents of the measure, this was a significant improvement in education with only minimal costs.

Funding Education Reform: Taxes and the 1985 Legislature

Undoubtedly one of the most important issues confronting legislators during the 1985 session was the manner by which the state would fund its programs, including, CERA, for the coming year and beyond. With the imposition of a one cent sales tax increase the previous year and the budget surplus it generated, legislators were eager to give some kind of fiscal relief to their constituents. The 1984 decision to roll back the tax on food by one third for each of three years began to be questioned, however, first by the administration and then by other legislators concerned with avoiding a budget deficit.

Administrative fiscal staff estimated that the surplus revenue generated from the previous year would total approximately $74 million. Legislative staff estimates placed the surplus even higher, at approximately $135 million. Despite these projections, in his 1985 budget address, Alexander asked the legislature to either repeal its decision to remove the state sales tax on food or provide some alternate source of adequate revenue. Alexander reminded

the legislators of the expense of the education reforms they enacted the previous year, and emphasized the importance of adequate funding to their success.

Citing conclusions from a two year Special Study Committee on tax reform, House Finance Ways and Means Chairman John Bragg insisted that the fiscal situation called for major tax reform. Bragg said that this would include the implementation of an income tax. This possibility particularly appealed to the TEA, who for years had favored an income tax for the potential revenues it would generate for education programs. The Governor, House Speaker McWherter and Lt. Governor John Wilder however, disagreed with the politically unpopular income tax proposal on grounds that the public was not ready to accept it.

Mcwherter, in particular, said he would definetely oppose an income tax passed by the legislature because he feared the opportunity it would present for future legislatures to "keep pushing it higher and higher" (Democratic Caucus Legislative Report, February 14). McWherter did indicate that he was willing to consider a referendum to allow voters the chance to decide the issue for themselves. But rather than an income tax referendum, McWherter favored a plan using the anticipated surplus of the coming year to make up for the revenues that the state would lose when the first stage of the food tax phase out came into effect. This amount was estimated by the legislative fiscal staff to be approximately $70 million. Critics of his proposal maintained that the difficulty with this approach was that the problem would arise again the next

year, without a surplus to cover it. This would create a fiscal shortfall that could seriously undermine the operation of CERA.

As the battle over tax reform continued, there was brief speculation that a resolution to call a constitutional convention that would permit a statewide referendum on an income tax might be adopted. Any hope for an income tax was soon stopped, however, when the House and Senate voted in April to keep the sales tax on food and renew the five one half percent sales tax on food and renew the five and one half percent salex tax rate for the coming year. Income tax advocates, forced to accept this alternative tax proposal, warned legislative leaders that although they may have put off the questions of an income tax for this year, funding demands of the future would make it inevitable that the tax question would soon return.

Although the sales tax on food would generate some tax revenues to be spent on programs like CERA, legislators eager to provide constituents relief from taxation worked to legislate exemptions from other taxes. During the last week of the session, the House voted to approve a bill to provide expemtions from the amusement tax for charity and non-profit organizations. The bill had already passed the Senate. Changes were also made to reduce rates for the Hall Income Tax, a tax paid by Tennesseans who earn dividends or interest from investments. The legislature raised the amount an individual may exempt from their payment of the tax (Democratic Caucus Legislative Report, May 23, 1985).

Another move to provide tax relief for Tennesseans by

eliminating the state tax on residential utilities was made in the form of an amendment to the sales tax bill. McWherter and others who were in favor of the food tax rollback had maintained that if the rollback was repealed, they would favor the elimination of the utilities tax. This move was successful and the tax was removed.

The effect of the bills was a modest tax relief for lower income groups. However, these actions also succeeded in reducing the state's resources for funding both existing and new programs. The TEA and some legislators fear that if the education program is to function well, more immediate attention must be paid to securing ample funding. Statistics have been cited, for instance, that show more teachers choosing to enter the first rung of the program than expected. Representative Cobb told reporters that although only 32-40,000 teachers were expected to show interest in the first year of the plann, 39,500 had signed up by the beginning of the year ("Career ladder costs," 1985).

Conclusion

The 1985 legislative session surprised education observers who expected a fight over the revision of the controversial CERA. The key participants in 1984's battle over the program: the administration, the office of the education commissioner, the legislative sponsors, and the TEA all adopted a "wait and see" attitude during the revision process. They opted to let the program work one full year before substantively changing it. Whether this

decision was reached independently by each group involved, or upon the strong suggestion of the legislative leadership of Speaker McWherter, Lt. Governor Wilder and others is uncertain. The significant impact that the legislative leadership had on the smooth passage of the reforms that were enacted, though, was acknowledged by all parties involved. Another factor that determined the bill's success, most agreed, was the spirit of the compromise and open negotiation that characterized debate over the bill. Prior to the 1985 session, there were two major questions on the minds of those concerned about the fate of the CERA: (1) Would the TEA attempt to make major changes in the program, or would they instead assume new education priorities; and (2) Would the legislature decide on a permanent, adequate source of funding to ensure the fiscal security of CERA? The answer to these two questions at the close of the session is still not known. The TEA focused much of its attention, and with some success on other education issues this session. However, they have pledged that following this interim year they will make a thorough assessment of CERA and its impact on teachers.

The funding question is also uncertain. Despite the insistance of several legislators that a state income tax is necessary to finance expenses of the future, particularly the CERA, the legislature again postponed consideration in favor of other minor tax reform proposals. The sponsors of the CERA acknowledge that for this year, the program is fiscally sound. The future beyond next year, though, is still to be determined.

CHAPTER VI

Discussion and Recommendations

Introduction

This chapter presents a discussion and analysis of important findings from an extended study of the Career Ladder Program in Tennessee. As described in Chapter I of this report, the project has traced the Tennessee program from its inception through the first year of implementation. Work was sponsored by the U.S. Department of Education, Secretary's Discretionary Fund, and has been carried out at the University of Tennessee, Knoxville. A series of short reports or Updates issued during the project are included in the Appendix to help provide an orientation to the various activities and interim results. A companion to this report documenting events through the end of 1983 is also available (Handler & Carlson, 1984).

It has been a major intent of the project to gather, analyze, and disseminate data useful to decision makers in states and local school systems which have initiated or are considering career ladders as an incentive strategy. With that goal in mind, conclusions based on the Tennessee experience are presented in this chapter. They are discussed in the context of principles derived from the relevant professional literature. Recommendations developed from practice and grounded in a theory and research base are included to help in shaping a workable Career Ladder model to strengthen the teaching profession.

Defining Career Ladders

Career ladders are structures that have gained popularity recently as potential opportunities to identify and reward the most productive teachers, provide a larger share of the salary pool to those teachers, and stimulate greater retention of the best teachers while attracting more highly qualified aspiring teachers (Griffin, 1984). Most career ladder plans have several features in common (ATE, 1985): several career steps (Tennessee has five); predetermined advancement criteria (A detailed set of teacher competencies in five domains has been adopted); objective evaluation procedures (There are multiple data sources, teams of outside evaluators, and other procedures to increase "objectivity"); opportunity for new roles at upper steps (At Levels II and III--the upper rungs of Tennessee's ladder--extended contracts and added responsibilities are available); and training/certification requirements for advancement (Certificates are issued for up to five years' duration; re-evaluation is required to advance or to remain at one's career level). Claims have been made for a number of advantages of career ladders. These include: additional pay provisions; systematic performance evaluation; use of at least some peer assessment; and added status as well as responsibility for successful applicants. Supporters look toward career ladders as capable of substantially restructuring the delivery of education services (Palaich & Flannelly, 1984) and the teaching profession itself (Alexander, 1983).

Those proposing or designing career ladders may base their

plans on different sets of assumptions. The nature of these will have important implications for the program that results. Designers' assumptions about the presumed outcomes of career ladders may focus on: strenghtening the teaching/learning process; improving teacher morale; more effective use of staff; unifying the school organization; retaining competent teachers; providing challenges and incentives to top teachers; differentiating teacher roles; and improving certification, licensing, and tenure systems, among others (ATE, 1985). Patterns of assumptions lead to differing emphases in terms of resource allocation, evaluation procedures, and requirements for advancement on the career ladder. They may also affect the nature of incentives offered, including both delayed or long term "macroincentives" and more localized, shorter term "microincentives" (Diaz, 1973).

An important factor, too, is the approach and emphasis taken regarding excellence in teaching. In Tennessee the career ladder evaluation system screens for minimum competencies in such communication skills as reading and writing. At the same time, it purports through the established competency indicators to identify the most outstanding teachers in the state. The question of excellence versus technical competence as a dimension of career ladder assessment has been addressed by Jung (1984), who points out that decisions must be made regarding the assumed degree of interdependence in teaching. He asks, for example, whether individual teachers produce excellence, or whether it transcends the individual classroom setting. Goldberg (1985) has added another

dimension to this important question by pointing out that the desire to promote and reward excellence must be considered in relation to equity considerations necessary to ensuring integrity of the profession.

Current Status

Given the range of career ladder assumptions and conceptualizations, it is not unexpected that states and localities have responded in a variety of ways. The rapid growth of interest in career ladders has been well documented (The Nation Responds, 1984; ECS, 1984). Organizations such as the Southern Regional Education Board have monitored and regularly report on state level career ladder developments (see Appendix). In a recent Education Week report ("Changing course", 1985), 14 of 39 states reporting action in this area had taken steps to study, pilot test, or implement career ladders or similar incentive programs. Twenty-four more had such programs under consideration, and only one had rejected (but was re-studying) the notion.

Relatively few states have, like Tennessee, adopted statewide programs that do not provide for district level options in designing local versions of a career ladder. The Tennessee model was implemented under a very short timetable, with virtually full operation expected in the 1984-85 school year for a law passed in February, 1984. Although some preliminary work had been done on the plan, the consequences of proceding swiftly and with minimal time for trial and revision have surfaced repeatedly (see Chapters

3 and 4). It will be important as other states (e.g. Idaho, Illinios, Texas, Utah) continue to implement their own systems to examine the relative merits of statewide approaches versus more idiosyncratic and voluntarily developed structures. Analyses should include states which have undergone rapid program implementation and those which have built in extended periods of study and planning (e.g. Kansas). As pointed out by Cornett (1984, p. i), "If the concept of career ladders is to succeed, states will have to closely monitor their own plans as well as gain from the experience of others."

The considerable national attention to merit pay and career ladders has prompted their inclusion in several recent surveys. The 1984 Gallup Poll, for example, found that teachers oppose the idea by 64% to 32%, based largely on difficulties in evaluating and anticipated morale problems (Gallup, 1984). This same survey found, however, a high level of public support for the concept (76% in favor).

In a Harris poll conducted for Metropolitian Life Insurance Company (1984) 71% of teachers agreed that merit can be judged on an objective standard. Teachers responding to a 1983 American School Boards Association poll (Rist, 1983) generally favored larger bonuses for more effective teachers (63% of respondents), with the favored evaluators being school principals. Concerns and opinion differences revealed in these and other data sources indicate the importance of carefully assessing teacher perceptions as local or state career ladder plans are undertaken. Specific sources

of opposition and areas of support need to be identified so that appropriate action can be taken. In Tennessee, as documented in the Part I report of this study (Handler & Carlson, 1984), negative teacher opinion was an early and significant influence on legislative developments as well as certain career ladder features that emerged in the final bill.

Evaluation Issues

The evaluation process utilized to determine teachers' career ladder status is central to the credibility and success of any such program. In Tennessee, the statewide career ladder evaluation process (see Appendix) includes multiple data sources (classroom observation, principal interview, peer and student questionnaires, and portfolio) yielding information about an extensive set of competency indicators within five domains (planning, instructional strategies, classroom management, evaluation, professional leadership). Evaluation of Probationary, Apprentice, and Level I teachers is to be carried out by local school system personnel using a state model or some approved alternative plan. Evaluation of Level II and III teachers is conducted by teams of state evaluators under rules established by an Interim Certification Commission and approved by the State Board of Education.

Formulating and operationalizing the Tennessee career ladder evaluation process has been a tremendously complex undertaking. The Interim Certification Commission, under the aegis of the State Department of Education, was authorized by the Governor to begin

work on developing evaluation procedures during the 1983 legislative session, although the proposed program was not enacted until a 1984 Special Session of the legislature. Governor Alexander in urging support for his master teacher program had written that: "Teachers know better than anyone else how to evaluate and grade others' performance. How do you determine a student's grade every six weeks for English composition, for music, for art, or for speech? Is evaluating a teacher's performance every five years any more difficult (Alexander, 1983, p. 14)?" Subsequent events have amply demonstrated that this task is, in fact, a great deal more difficult, particularly when the professional, political, and personal stakes are as high as they have been in the process of implementing the Tennessee Career Ladder Program.

Before taking action to create a set of procedures, for example, work by the Rand Corporation and others underscores the importance of deciding on a clear purpose for conducting the evaluations. Different purposes (e.g. improvement or accountability) must be considered according to the pertinent organizational level (e.g. determining individual status or school status) when planning how to evaluate (Wise, 1984). The Tennessee evaluation model aspires to help teachers improve. It includes post-observation conferences which might serve as opportunities to receive useful feedback, and an end of year summary conference for career ladder applicants to tell them exactly where they were strong or deficient. During the first year of implementation, opportunities for interim performance feedback did not materialize for many teachers.

Evaluators were not consistent in providing such information, and their training had not emphasized this role (see Chapter 3).

Although the Tennessee model gives some attention to the improvement role, teachers appear to perceive it as a vehicle for making job status decisions and determining their "fate" as to certification and salary supplements (see Chapter 3). Including as it does a set of minimum competency screens, and based as it is on a relatively generic set of behaviors, the system may also be inferred to have an orientation toward establishing some "least common denominators" of teaching. Those who score the highest number of points in the prescribed areas are judged to rank at the upper career levels (provided they have the requisite years of experience) and are pronounced excellent teachers.

The question of purpose (e.g. evaluation for basic comptence versus evaluation to judge relative merit) has implications for the selection, training, and assignments of evaluators. Career Ladder evaluators in the Tennessee model during 1984-85 were primarily teachers who took leaves of abscence from their respective positions. Just over 100 individuals, trained for approximately 3 weeks by State Department Staff members in the procedures they would be called upon to use, served as evaluators for all Level II and III applicants who could be assessed this year. Three evaluators were assigned to each candidate, with one required whenever possible to be from the applicant's subject area or teaching level. Each evaluator made a single observation visit (one class period or lesson) to the assigned candidate. Teachers expressed

serious concerns about the limited number of observations and the potential lack of familarity of observers with their particular teaching assignment (see Chapters 3 and 4). The Rand Corporation research teams studying this area would support the concerns of Tennessee teachers. They wrote: "The evaluation of excellent teaching, we believe, requires judgements by experts rather than generalists. Whereas principals can evaluate for performance improvement (where the need for reliability is relatively low) and can evaluate for termination decisions (where the criteria are least common denominators of teaching), the judgement of excellence requires an expert. Excellent teaching, we submit, cannot be judged in the abstract as is generic teaching comptence. To judge excellence, an evaluator must know the subject matter, grade level, and teaching context of the teacher being evaluated" (Wise, 1984, p.73). In interviews with Tennessee teachers, the frequently great disparity in resources, facilities, and leadership or growth opportunities across districts (often related to the rural-urban factor) made context a matter of particular concern (see Chapter 3).

Another issue that has surfaced in the movement to institute career ladders for teachers is the appropriate role of research findings. In Tennessee as elsewhere, the evaluation instruments and lists of criteria or competencies being measured were based in large part on available research literature. Since much of this literature was derived from elementary classrooms and focused on a fairly narrow set of instructional practices, early reliance on "the research" was gradually modified, although not without

controversy. Rosenholtz (1984), who played a role in the initial formulation of Tennessee's evaluation competencies and was involved in early conflicts over this issue, has continued to emphasize the need to develop criteria that are known to relate to the improvement of student learning. Prominent researcher Walter Doyle has cautioned that: "Research relates to practice not as a source of prescriptions or as a blueprint for all teachers to follow under all circumstances. Rather, research results define a continually growing knowledge base for interpreting classroom events and constructing situationally appropriate ways of managing learning opportunities" (Doyle, 1984, p. 57). Bird (1984) echoes this appeal to avoid using research findings as uniform standards for evaluating teaching.

Whenever evaluation standards or procedures are discussed, it is likely that the term "objectivity" will be used. The Tennessee system was designed, particularly in its sensitive first year, to achieve a high level of objectivity. Instruments and procedures were designed with low inference responses and cross-checking built in whenever possible. Further, every component on each of the several data sources was assigned a specific weight by a designated committee, creating a complex point value structure. Although certain aspects of the point system were presented in the Teacher Orientation Manual (1983), interviews and surveys revealed that the determination of scores was not widely understood and the objectivity of the procedures used to gather data was in doubt among many teachers (see Chapters 3 and 4).

While one may debate the relative merits of observations, questionnaires and other data sources as objective indicators of teaching performance, the more pertinent issues that need to be addressed appear to be: (1) the appropriate emphasis to be placed on objectivity in an evaluation system; (2) the relationship of evaluation to the accepted definition of teaching as, for instance, art, science, or craft; and (3) the extent to which criteria need to be differentiated on the basis of teaching assignment, professional specialty, or other contextual factors. Data acquired during the case study of Tennessee's Career Ladder Program highlighted existing concerns as well as strategies undertaken to deal with these issues. While teachers clearly valued reliable, objective performance measures, they also placed high priority on the system's ability to take into account local constraints or situations. There was considerable reluctance on the part of experienced teachers to commit to a system in which these characteristics had not yet been clearly demonstrated (see Chapter 3). Those in such "special areas" as vocational education, special education, or library/media were not eligible for evaluation this year since their criteria and instruments had not been approved in time. Thus, although very limited differences in criteria or competencies actually remained in the final version, several educator groups were also cast in a position of watching the program unfold during 1984-85.

For those within and outside Tennessee who continue to observe with interest as the teacher career ladder takes shape, several

practices can be identified as critical to the acceptance and smooth functioning of the evaluation component:

1. Make use of teacher/educator input early and at all stages.
2. Inform teachers clearly, promptly, and in detail about the evaluation procedures and related policies.
3. Simplify the evaluation procedures to reduce confusion and anxiety and to lessen the burden of paperwork/preparation.
4. Use instruments that have credibility as indicators of teaching performance and reflect a clear set of assumptions about successful teacher behavior.
5. Provide prompt, consistent feedback for improvement early in the evaluation process.
6. Invest the necessary time and resources in training of evaluators, who should reach high levels of skill in assessment strategies and interpersonal communication.
7. Consider the human impact of the large scale changes in evaluation, certification, and promotion practices that career ladders represent.

The emotional nature of the controversy surrounding passage of Tennessee's Career Ladder appeared too pale beside the intense emotion generated by the individual successes, failures, and frustrations of teachers across the state (see Appendix for a summary of this year's evaluation results; Chapter 2 describes the bill's passage). Data reported in Chapters 3 and 4 document the problems perceived in implementation of this state's evaluation system. The first six guidelines derive largely from the experiences of Tennessee teachers and their principals, and each can be readily acted on by concerned decision makers here or elsewhere. The final guideline will require further study under sensitive, concerned leadership so that teacher morale is not irreparably damaged through

unintended consequences of the career ladder structure.

The Role of Working Conditions

One particular area, teacher working conditions, seems to merit special attention in this discussion. It seems likely to offer at least a partial solution to the stress and morale problems besetting teachers and principals as they deal with this rapid, large scale change in their professional lives. Although not an explicit feature of the Career Ladder framework, the worklife or working conditions of those being evaluated appears through the data acquired in Tennessee to be an important dimension for analysis. As Griffin points out, ". . . teaching as work is complex, multifaceted, highly interactive, intellectually and practically demanding, and largely uncertain" (Griffin, 1984, p. 32). Success in improving performance or rewarding this intricate work clearly requires sensitivity to a full range of factors that affect it.

The factors which Griffin and others discuss, and which seem especially relavent to instituting a career ladder for teachers, include: isolation from peers; top-down influence; accountability pressures and preoccupation with minimum competence; ambiguity and overlap in relation to school goals and expectations for teacher performance; limited school resources; and the situation-specific nature of many aspects of school life (Griffin, 1984, p. 18).

Teacher isolation has been and is today a challenging variable for researchers and policy makers to address. On one hand, a degree of isolation appears to enhance teachers' feelings of autonomy. They may feel better able to make professional decisions and have

a discernible effect on students' performance when "left alone" in their classrooms. The importance of autonomy and responsibility has been recognized by the Association of Teacher Educators, for example, in statements such as: "A change in staffing patterns and reward systems designed to better recognize the importance and potential of teachers will most certainly require altering the degree of authority some teachers are assigned. Increased authority and compensation for teachers who are given greater professional responsibility are imperative. If a plan does not include more professional autonomy for at least some teachers, it probably will not do much to improve teaching and learning" (ATE, 1984, p. 5). To the extent that these rewards are competitive, however, isolation may be accelerated and problem solving or sharing of ideas inhibited (Rosenholtz, 1984).

The Tennessee Career Ladder Program has incorporated these aspects of teacher worklife with varying degrees of success thus far. Provisions for teachers who reach Career Levels II and III to assume added professional responsibilities were included in the legislation, and options for extended 11 or 12-month contracts are available to these individuals. However, during this first year of implementation, the roles to be assumed were not clear, although suggestions were provided by the Teachers' Study Council and others. It was not clear, as well, how the local school systems who would have to organize and at least partially support these opportunities would be able or willing to respond. With little prior experience in peer assistance or mentoring across Tennessee

schools, it seems evident that making operational these desired changes will remain a challenge during the coming years. Complicating the situation still further is the need to recognize that conferring "status" on selected individuals to help others will not have an impact unless their status is accepted by those to be helped, and unless conditions in the schools support such collaboration and interaction about teaching practices (Bird, 1984). Unfortunately, there appears to be a long way to go before these facilitative organizational arrangements exist in a state where resources for public education are stretched thin and traditional staff relationships have seldom been altered. Since the results of the first year's evaluations for Levels II and III were released in late June with relatively small numbers successful statewide (see Appendix), the credibility of the status conferred on some candidates but not on one or more highly regarded colleagues is also open to question at this time. In the words of Palaich and Flannelly (1984, p. 7). "Changes in compensations systems must be seen as equitable or they will generate dissention and undermine morale. Teachers doing similar work should be compensated similarly, and differential treatment must be seen as justified".

Other aspects of working conditions have played noteworthy roles in the early stages of Tennessee's Career Ladder Program. Teachers repeatedly expressed, for instance feelings of being torn between apparently conflicting expectations. A number of those interviewed and surveyed indicated that they felt obliged to spend long hours in preparation of portfolios, interview documentation,

studying for tests, and so forth. At the same time, they reported anxiety or frustration over the time lost from their classroom instruction or preparation (see Chapters 3 and 4). Although this level of effort was not the intent of program designers, these internal conflicts undoubtedly had implications for the schools and classrooms where career ladder applicants worked. It will be important to continue to study the extent to which such ambiguity over roles and expectations persists as the program continues. Researchers have already obtained indications that career ladders and similar performance incentive structures may in fact increase levels of uncertainty, vulnerability, and insecurity of teachers (Goodwin, 1985). Probable reasons for this can already be inferred, but additional time is needed to determine the stability of this apparent side-effect.

In proposing a career ladder model based on extensive deliberations, the Association of Teacher Educators' Commission on Master Teachers built in explicit attention to the teachers' needs regarding recognition, status, and growth (ATE, 1984, p. 21-22). They give specific examples of ways in which seven aspects of working conditions can be addressed in conjunction with career ladder adoption. These key aspects are:

1. support for continued professional growth
2. recognition for contributions
3. nature of job assignment
4. work environment
5. material resources

6. adequate assistance from personnel who support teachers
7. participation in school management (work control and shared decision making).

Recent legislative events in Tennessee (see Chapter 5) indicate that these matters are important concerns of teachers and a number of influential legislators. Class size reductions, support personnel (e.g. guidance counselors), salary improvements, participation in decision making (e.g. concerning local school system evaluation processes), and decreasing non-instructional tasks (e.g. duty-free lunches) were among the specific issues dealt with during the 1985 session. A convincing case can be made for the need to strengthen these critical areas as a requirement for other changes in professional status or roles to have the hoped-for benefits.

Management and Policy Issues

There is a substantial number of management and policy issues which must be dealt with by career ladder decision makers. Some have been addressed in recent publications and they are supplemented in this section by additional insights gained from experiences in Tennessee and other states. Among the sources to which one can turn for overviews of management or policy matters are the Association for Supervision and Curriculum Development's task force report (ASCD, 1985), which provides a list of questions planners can ask concerning: goals and planning; design and implementation; and context and choice. The Association of Teacher Educators has also developed a set of guiding questions covering purposes, design,

process, and support (ATE, 1985). This organization concluded that ". . . a single career ladder model will not be appropriate for all situations" (ATE, 1985, p. 3). They viewed as a key function of program planners the careful delineation of responses to a wide range of essential issues.

In the view of the Education Commission of the States (ECS, 1983), at least ten important "do's and don'ts" need to be considered when dealing with teacher rewards or incentives (e.g. choose the right name, pay all teachers adequately). Even at that relatively early stage in the recent career ladder movement, the panel preparing these guidelines urged against changing the rules on those currently teaching, recommended making the program optional for current teachers, and stressed the need for teacher input. Recent experiences in Tennessee and elsewhere have lent added credibility to their advice.

Suggestions related to management and policy concerns have also been advanced by Griffin (1984) who stresses the need for organizational support during all phases of the program. Administrators who must deal with increased evaluative responsibilities as well as paperwork burdens need some form of relief from other demands. Constraints to effective program functioning should be anticipated and dealt with ahead of time whenever possible, according to Griffin. In Tennessee, the fact that implementation was complex and fast paced led to some important midstream changes or refinements in rules and procedures. These represented a widespread source of frustration in the schools (see

Chapters 3 and 4).

Dr. Jay Robinson, Superintendent of the Charlotte-Mecklenburg (N.C.) Public Schools, has reiterated from a practitoner's standpoint the importance of adequate time to plan well, with open communication and broad teacher involvement (Robinson, 1984). Dr. Ray Turner, representing the Dade County, Florida school system, echoed in a recent speech the urgency of adequate implementation time for career ladder success (Turner, 1985). Former U.S. Secretary of Education T.J. Bell (1984), the Merit Pay Task Force of the U.S. House of Representatives (1983), and prominent policy analyst Michael Kirst (1984) have all come out strongly in support of active and continued involvement of teachers and other key participants in the shaping of career ladder specifications. Peterson and Kauchak (1985), speaking from recent experiences in Utah, added to the involvement issue several other "lessons" worthy of note, including the impact on local school system evaluation practices and the implications of a greater emphasis on documentation of one's professional behaviors.

Tennessee's Career Ladder Program fared better on some of these issues than others. The Part I report of this study (Handler & Carlson, 1984) described in detail the intentional downplaying of teacher involvement in early planning stages, and the limited forms of input opportunities coming subsequently. The present report evidences the continuing spinoffs of that strategy, based upon interview and survey data as well as legislative actions, media reports, and other sources. Early nomenclature (e.g. Master

Teacher versus Career Ladder) and initial associations with merit pay concepts have also been slow to fade and while not as serious, continue to contribute to teachers' hesitancy about politicians' and others' "real intents" in this area (see Chapter 3).

One of the areas in which Tennessee has taken decided action to clear up communication difficulties and improve delivery of services has been the reorganization of its Department of Education. Consistent with recommendations of Murphy, Mesa, and Hallinger (1984) on the subject of state roles in educational reform, the administrative structure was changed to create a separate Career Ladder Division, selected personnel were reassigned, and job descriptions were rewritten to enhance communication and provide clearer access to needed information. The implementation of a statewide career ladder has vastly increased the information management tasks of the Department of Education.

It has become clear through the Tennessee experience, in fact, that efficient data handling may be one of the most critical tasks associated with a system of this sort. Computer errors that delayed some batches of bonus checks were, for example, magnified by communication problems and headline-grabbing media reports into major events that continued to trouble local school personnel as well as state officials and career ladder applicants. The inpact of statewide policies and practices (including such "snafus") on local school leaders has not been systematically addressed to date, but clearly needs to receive attention as the program continues.

In an analysis of previous merit pay and other performance

incentive plans, Freiberg (1985) arrived at a pessimistic conclusion about their ultimate viability. The factors he saw as causing failure of such programs included: their legislated, top-down nature (true also of Tennessee's Career Ladder); little input from teaching professionals (a situation discussed above); deficient long-term financial and cost-benefit analyses (while yet to be determined in this state, already evident as a major concern of teachers); focus on individual advancement rather than an improved learning environment (although the Tennessee Career Ladder does not directly deal with student learning, accompanying legislation addressed several other educational needs); inadequate base pay (another leading concern of this state's teachers); and undue removal of the best teachers from their classrooms (a factor felt to some degree in the hiring of state evaluators from the ranks of highly qualified teachers, but not clearly apparent at this stage in other areas). One need not accept the inevitability of program failure in order to profit from the insights of those who, like Freiberg, have come to doubt the applicability of performance pay systems to educational contexts. More help is now available to policy makers who are considering or developing career ladders and other incentive pay systems for education personnel. A recent publication by the Education Commission of the States, for example, provides explanations and guiding questions concerning compensation plans, including: whether additional pay to outstanding teachers is a sound strategy, what the chosen rewards should be given for, how performance can be measured, and what roles various groups should

assume (Flannelly and Palaich, 1985). Other recent publications available from this source address such critical topics as the legal issues in performance pay (Belsches-Simmons & Bray, 1985) and cost factors affecting such systems (McGuire & Thompson, 1984). Career ladder decision makers, including legislators, program developers, and those charged with implementation, need to provide for legal due process through appeal procedures and efforts to ensure fairness, consistency, and protection of constitutional freedoms. The Tennessee system includes a number of these provisions. However, legal challenges have been expected throughout the developmental period, particularly since final scores were released in late June, 1985 for this year's applicants (see Appendix). This issue is one which will need to be carefully studied as more data become available about the nature and resolution of court cases associated with the program.

Costs, too, represent an issue that has required considerable attention in Tennessee and can be expected to figure prominently in any serious discussion of career ladders. In this state, ensuring a lasting source of support has led to major legislative struggles (see Chapter 5) and promises to be a continuing concern. Teachers have expressed considerable skepticism over the long term fiscal stability of the program (see Chapter 3). They also expressed concern that the large amounts of money being spent for the Career Ladder, particularly in terms of its administration and related publicity efforts, have not instead been directed toward school or classroom level improvements. While arguments clearly can be

advanced favoring either side of this issue, decision makers would be well advised to study long as well as short range cost analyses and plan to inform constituents of the nature of the necessary expenditures as well as the projections and strategies for future funding.

Data collected in Tennessee signal another important resource consideration: the differing levels of current funding and resources across school districts, schools within the same districts, and individual classrooms. Teachers were justifiably sensitive in this state to the fact that some had ample support in terms of instructional resources, planning periods, staff development opportunities, and other factors entering into their preparation for and attainment of the desired career ladder status (see Chapters 3 and 4). Designers of the evaluation process intended to accommodate these differences. However, the size of the discrepancies in a state with Tennessee's geographic and economic diversity cannot be overlooked. The range of sophistication and experience in teacher evaluation, for example, an activity intrinsic to the career ladder concept (and now mandated to follow prescribed guidelines at the local as well as state level) has been and will remain a serious concern among those seeking to ensure equity and credibility of the program. It will be important to avoid what Griffin calls ". . . the trap of assuming that schools and classrooms are all alike, that pedagogical activity and curriculum intentions can be transferred with equal effect from situation to situation, that not only is 'a teacher is a teacher is a teacher', but that

'a student is a student is a student' (Griffin, 1984)." Nor, it might be added, is one career ladder candidate like any other, apart from a careful analysis of the context in which their merit is being assessed, the process being used to do so, and the opportunities available to them to improve.

Events in Tennessee underscore the critical role played by management and policy issues in instituting career ladder structures. Unfortunately, perhaps, for those involved in the early stages of implementation in this state, substantial difficulties occurred with communication, data management, and responding to the significant number of special situations that often required policy decisions after the program had already begun (see Chapters 3 and 4). These problems have had repercussions difficult to reverse, particularly in terms of teacher and public perceptions of the Career Ladder Program. It is unclear at this initial phase of implementation, the extent to which substantive strengths or weaknesses of the program (e.g. the incentives offered, the evaluation process used, and the career differentiation established) are being masked or exaggerated by related management considerations. Until further study of this interaction can be carried out, there are some initial generalizations that can be made regarding management and policy aspects of Tennessee's Teacher Career Ladder. These include:

1. Management of information and of resources are key determinants of successful career ladder operation. These activities require thorough planning and adequate funding. Apparently clearcut decsions such as how much information teachers were entitled to concerning evaluative rating

scales and item relationships of point values were among those that assured considerable importance at various stages of implementation. Coordinating resource allocation in terms of local and state contributions and responsibilities was another key area in Tennessee, based on the structure of the statewide career ladder (e.g. with local school sytems evaluating applicants for the lower three levels while the state handles the two upper levels).

2. Staff development must be viewed as a closely related function in establishing a career ladder for teachers. The Tennessee Instructional Model (TIM), a staff development program which first assumed importance as a route to 1984-85 career ladder access for eligible teachers, has come to be viewed by many school personnel as virtually a prerequisite to successful career ladder evaluation. This has been due largely to the two programs' comparable, although not identical, terminology. Completion of TIM has been accomplished by thousands of Tennessee teachers, albeit under varying circumstances in terms of released time, incentives or payment, instructor preparation, and local system pressure. At minimum, these teachers have shared a common review of some basic instructional principles, providing a potential starting point for further, more personally-tailored staff development experiences.

It seems clear that staff development must transcend the workshops or other strategies targeted at teachers. There is an urgent need for appropriate staff development designed to assist principals, supervisors, and career ladder evaluators as they deal with new responsibilities and working relationships. These individuals should not be expected to acquire and apply complex sets of evaluative and instructionally supportive behaviors in the absence of ongoing, needs-based training and coaching.

Similarly, students engaged in preservice education for teaching or administrative positions must also receive appropriate training to fulfill the new professional expectations that accompany the statewide Career Ladder Program. This will only occur if their

instructors are well acquainted with these expectations, and if higher education institutions provide high quality programs that bring to life for students the theory and practice of effective instruction.

The influence of the Career Ladder Program for teachers--ostensibly just a performance based pay structure--is thus seen to touch on many aspects of education in Tennessee. By obtaining a substantial portion of the resources devoted to educational reform, it has implicitly reduced the attention that can be paid to other important needs. It has already begun to alter relationships among teachers and between teachers and administrators. It is expected to influence the relationships between teachers and parents as well (see Chapter 3), and changes in the general public's view of teachers are not unlikely in view of the fairly extensive media coverage of this program. With these being just a few of the diverse areas of influence, one must strongly urge that serious efforts be made to investigate such ramifications of the Tennessee program. The State Department of Education has recently initiated a set of primarily internal evaluation activities for its year-old program. While rather late in coming, their results will be instructive as advocates of this intricate teacher career ladder model work to give it a strong foothold. For other states or school districts embarking on this ambitious undertaking, funds devoted to early, systematic program evaluation will undoubtedly be a worthwhile investment as their career ladders take shape. The availabity of timely evaluative information cannot be expected

to fully counteract strong political forces such as those at work in Tennessee. It can, however, make implementation of even politically conceived or controversial programs a more positive experience for all involved.

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APPENDIXES

APPENDIX A

CAREER LADDER UPDATES

****
INTRODUCTION
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A case study is being conducted to examine the process by which Tennessee's Career Ladder Program has been developed and is being implemented. This study is sponsored as a grant by the U.S. Department of Education and funded through the Secretary of Education's Discretionary Fund. The initial phase of the project has been completed, with findings and supplemental documents included in the first report: Shaping Tennessee's Master Teacher Program, 1983. This Part I Overview highlights major points in that comprehensive report. It emphasizes the development of the Master Teacher Program through the end of 1983. At that time, a legislative committee developed the Comprehensive Education Reform Act of 1984, which includes Tennessee's Career Ladder Program. As new developments occur, updates to the Part I Overview will be prepared. Emerging events and issues will be treated in depth in the Part II report, to be completed in the Spring of 1985

Background information for Phase I of the project was compiled from interviews, content analysis of pertinent documents, transcriptions and analysis of meetings, informal conversations with individuals, various groups' responses to questionnaires, and monitoring of legislative sessions and committee hearings. This case study will be of value to decision makers in Tennessee and other states currently considering or implementing similar programs The set of recommendations developed by analyzing events and issues in Tennessee will have important implications for the improvement of teacher compensation and evaluation programs in other states or localities.

****
EARLY STAGES OF THE
MASTER TEACHER PROGRAM
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Governor Lamar Alexander proposed his Master Teacher Program on January 28, 1983 in a widely publicized speech to the Tennessee Press Association. The program included four career stages, each one offering the teacher a five-year certificate. The career stages (Apprentice, Professional, Senior, and Master) would allow for upward mobility each five years or an opportunity to renew the five-year certificate and remain at the same career level. An exception was that an Apprentice Teacher would have to successfully advance to the Professional level in five years or seek a new career.

The governor made an early commitment to get the Master Teacher Program, part of a 10-point Better Schools program, adopted. He and his aides devoted a major part of their time to promoting a program that the governor described as being the most important proposal he would make while in office. Publicity efforts were extensive. Speaking tours were conducted both in and out of state; selected audiences were sent brochures and newspaper clippings about the program; teachers received bi-weekly newsletters; and several lobbying groups were established.

The governor had developed the outline and essential elements of the program without directly consulting teacher groups. Since its incentive pay features were controversial and sure to be opposed by the teachers' association, he did not want to give them an opportunity to publicly debate the program before it was formally proposed.

The governor portrayed his program as one that had emerged from deliberations of a Legislative Task Force and recommendations from higher education and business. The Tennessee Education Association (TEA) did not view this as being the case. TEA also objected to several aspects of the program itself (e.g. handling of tenure, negotiations, fair evaluation procedures). Subsequently, TEA drafted its own version of a bill to address issues and concerns it felt were needed in the overall education reform package. The TEA bill contained a number of points that were eventually included in the final version of the legislation.

Several versions of the Master Teacher Bill were proposed, including a "Compromise Bill," in an effort to gain greater support for the program. This was not accomplished by April, when the bill was deferred for a year to be studied by a special legislative committee (Select Committee on Education).

Following deferral of the bill, the governor continued his vigorous efforts to develop a program that would become legislation in 1984. Steps taken by the governor included appointing committees to study and develop the program, a massive publicity campaign, and involvement of teachers, lay people, and organizations which would be affected by implementation of the new program. The Ad Hoc Interim Certification Commission was appointed to develop the proposed new program. Several staff members from the State Department of Education were assigned special duties pertaining to development and promotion of the program. A Better Schools Office was created in the State Department to house staff working full time on the program and to act as the center of operations for the program. A Teachers' Study Council was organized in part as a statewide forum to offer opportunities for teachers to study the program and communicate their views.

The general mood of constituents, lay groups, and professionals across the state indicated that the public was ready to support some

type of educational reform. The controversy between TEA and the administration over what the program should encompass remained a major challenge for Alexander. The teachers' association objections concerning the governor's program focused on the following points: 1) The base salary of teachers in Tennessee is not adequate. The salary factor should be addressed and remedied before any other special rewards were considered; 2) A quota should not be placed on the number of teachers and administrators receiving the rewards after they have met the criteria for acceptance; 3) Objectives for evaluating outstanding performance should be established and measures must be taken to prohibit the influence of political forces and favoritism in the evaluation process; 4) The state must take responsibility for the extra funding needed and expected as a result of such a program; 5) A review committee procedure would need to be built into the program as a safeguard against undue political influence and 6) Teachers and administrators should play an integral part in the development and implementation of the program.

These objections and other issues were vigorously upheld by the teachers' association during deliberations of the Select Committee. Negotiations continued, however, as all sides worked toward agreement on an incentive pay program and career ladder for the state.

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REACHING AGREEMENT ON A
CAREER LADDER PROGRAM
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The Select Committee on Education, appointed by the legislature in April, 1983 to study the proposed bill for the following year's legislative session, was ready with its version in December. The committee comprised seven senators and seven representatives and was organized into three subcommittees to study different aspects of the legislation. The Select Committee's proposal was entitled the Comprehensive Education Reform Act of 1984 and included Tennessee's Career Ladder Program. It proposed four steps: Apprentice, Professional, Senior, and Distinguished Senior. Currently employed teachers could apply to enter the Career Ladder at the appropriate level corresponding to their years of experience in teaching as follows: Professional Teacher - 3 years at the Apprentice level; Senior Teacher - 5 or more years at the Professional level or 8 years certified teacher experience; Distinguished Senior Teacher - 5 or more years at the Senior level or 12 years certified teacher experience. Options for teachers presently teaching would include: 1) Applying to enter the Career Ladder and successfully completing requirements. These individuals would be entitled to an across the board pay raise and an incentive pay raise; 2) Staying in the present system. These persons would still receive an across the board pay raise; 3) Applying to enter the program, but failing to

meet requirements. These teachers could keep their current certificates and remain in the old program; and 4) Applying for the new program and trying it out, but opting to return to the old system.

Governor Alexander's Master Teacher/Career Ladder plan was a central focus of discussion and debate throughout Tennessee during 1983. It promised to remain so in 1984 as the governor announced in December his plans to convene a Special Legislative Session in January, 1984 The Special Session, which was the first of its kind in 17 years, would be devoted to the topic of education reform and ways to finance it. Dealing with possibly the most controversial educational issue in the state's history, Governor Alexander's move to call the session left little doubt that legislators would be forced to make the decision concerning education reform without further delay.

For nearly six weeks legislators deliberated over the educational reform package. This session was unique in that the long established Senate committee structure was reorganized so that only two committees remained standing: the Education Committee and the Finance Ways and Means Committee. Debate in the House and Senate on various aspects of the program and how to finance it was long and involved. However, agreement was reached in late February and the Comprehensive Education Reform Act of 1984 became law.

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TENNESSEE'S
CAREER LADDER PROGRAM
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The final version of the career ladder for teachers, to be implemented in Fall, 1984, includes five career levels. Teachers at four levels will receive salary supplements, to be continued for the duration of their certification periods. Starting with $500 supplements for those qualifying as Apprentice Teachers, the salary incentives will range up to $7,000 for a teacher at the top rung of the ladder working a 12-month contract.

The designated career levels following one year at Probationary Teacher status are Apprentice Teacher, Career Level I Teacher (eligibility after 3 years of experience under present teaching certificate), Career Level II Teacher (eligibility after 8 years experience) and Career Level III Teacher (eligibility after 12 years under present certificate). Extended contract options will be avilable to those selected as Career Level II or III Teachers. The duties of teachers on extended contracts will be prescribed locally in relation to an approved list of possible roles issued by the Commissioner of Education Teachers at the higher career levels will be expected to demonstrate leadership in working with beginning teachers and experienced colleagues.

For 1984-85, entry onto the career ladder will not require evaluation under the state approved system. Several "fast-track" options were created, including submission of passing scores on the National Teachers Examination Core Battery, an appropriate NTE Specialty Area Test, or a state-developed secure test, along with a positive recommendation from the local system. The Tennessee Career Ladder Test assesses reading, writing, and professional skills Other alternatives available for first year entry include successfully completing a state approved staff development program (e.g. state developed Tennessee Instructional Model) or having a positive evaluation under a local process which has received state approval for this use.

The Career Ladder Program is optional for those currently teaching in the state, but mandatory for all new teachers. Presently employed teachers may use the "toe in the water" provision to try the new system but return to the former certification system if they so choose.

Evaluation criteria specified in the legislation include: classroom observation, review of evaluations conducted in the local school system, personal interview, and examination of inservice and professional development activities. The components field tested for likely inclusion in the state evaluation system were: observation instrument, written test, portfolio of teacher materials, peer questionnaire, student questionnaire, teacher interview, and principal interview. The observation process includes such features as: 3 person teams, multiple visits, pre-and post-observation conferences, and an opportunity for the teacher to request limited changes in evaluation team membership. The State Certification Commission has responsibility for evaluating teachers applying for Career Levels II or III. Local school systems are charged with evaluating applicants for lower career levels, using state approved evaluation procedures to make their recommendations to this commission. Once the requirements are successfully completed, teachers receive certificates valid for 1 year at Probationary level, 3 years at Apprentice level and 5 years at higher levels. Specified conditions must be met (e.g. completion of one college course) for certificate renewal or advancement to the next level.

Several major differences can be seen in the final version of the Career Ladder as compared to earlier drafts in 1983. These include:

- Elimination of quotas
- Extended contract options
- Additional responsibilities, such as textbook selection, curriculum planning and working with beginning teachers
- Local as well as state evaluations provided for at designated career levels
- "Fast-track" options for 1984-85 entry to the Career Ladder
- Option for current teachers to leave the Career Ladder if dissatisfied
- Change in terminology and shift to 5 Career Levels

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ISSUES
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A number of key issues have been identified through an analysis of Tennessee's efforts to institute a statewide Career Ladder Program. These issues are indicative of the types of concerns and controversies likely to arise in other states or localities involved in comparable educational reforms. A few of these pertinent issues are:

1 Can teachers receive fair and accurate evaluations? The appropriate use of existing research on effective teaching became a key question in the debate over an evaluation process. Some felt that research findings should have an extensive role in shaping the assessment of teacher performance, while others emphasized the limitations of our current research base in this area. Concerns were also expressed about the feasibility of designing an evaluation system that could accurately distinguish excellence in teaching. Since teachers had not been directly involved in planning the original Master Teacher framework, they found it more difficult as a group to accept the proposed evaluation process. The state teachers' association expressed strong reservations from the beginning concerning plans for teacher evaluation. Their objections related to the lack of clearly defined evaluation criteria and the susceptibility of the process to local or state political pressures. Teachers later had opportunities to provide feedback on the evaluation system, particularly in reacting to draft instruments, through Teachers' Study Councils set up in the summer of 1983. The issue of fairness and objectivity in evaluation persisted, however, prior to implementation of the Career Ladder Program.

2. What are the appropriate state and local roles in the evaluation and continued employment of teachers? In the debate over the proposed program, the ramifications of imposing a complex statewide process over and above a highly diverse set of local evaluation procedures began to surface. Concerns were expressed that the autonomy of local school systems to evaluate and re-employ teachers was being challenged. At the same time, the potential for local political forces influencing the evaluation process had to be addressed. The legislation provides for a combination of state and local school system responsibilities. Local evaluation procedures and certification recommendations are subject to state approval. It remains to be seen how state and local roles will actually take shape during implementation of the Career Ladder Program.

3. Is an incentive or merit pay plan better than across the board raises? The teachers' association, consistent with the National Educational Association position, was opposed to the concept of merit pay. An extensive body of literature exists which points out the problems with most prior merit pay programs. However, the administration argued that the Master Teacher Program was not based on a typical merit

pay approach, having many features which could address the flaws discovered in previous attempts. Despite these assurances, concern remained that salary levels in Tennessee are simply too low for the program to have a substantial impact. In current rankings of beginning teachers' base salaries, for example, Tennessee has in recent years ranked at or near 43rd in the nation. A key issue clearly pertains to the feasibiltiy of achieving the goals of attracting and retaining top notch teachers through an incentive pay structure in which supplements reach a maximum of $7,000 after 12 years as a certified teacher, assuming one accepts a 12 month contract and has a positive performance evaluation.

4. How can the quality of instruction be significantly improved? Considerable attention was given by supporters of the incentive pay program to its potential for making teaching a more attractive career in Tennessee. However, the issue of professional development for those currently in the workforce may have more to do with the long term success of the Career Ladder Program. Steps need to be taken to address the needs that the evaluation process will bring to light. Identifying the types of staff development experiences that will make a difference in teacher effectiveness (and student learning) and deciding how these should be provided (including state, local system, and higher education roles) are but two of the initial questions which require attention. Although the Legislation includes provisions for upgrading professional skills, the specific role that staff development should and will play in the Career Ladder Program awaits clarification.

5. Was there a clear, accurately perceived conceptual framework for the program? From its initial presentation, Governor Alexander maintained that his program was not merit pay, yet the term has continued to be used by supporters as well as opponents in discussing the plan. The fact that merit reward structures are more familiar than incentive pay may have caused greater reliance by the media and others on this term, blurring differences between the two concepts. Initially, too, heavy emphasis was placed on the master teacher concept, with a major focus on identifying Tennessee's very best teachers. Subsequently, the shift to a career ladder framework occurred. Greater emphasis was placed on additional responsibilities and extended contracts, as all eligible teachers could move to higher levels. At this time, the congruence between the intended focus of the program and the perceptions held by teachers and others remains an issue in the state.

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IMPLICATIONS
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Tennessee's experiences in developing and implementing a career ladder can provide a useful referent point for other states and localities. Among the implications of recent events in this state are:

1. A tremendous amount of political support is needed to enact an educational change of this magnitude. The governor and the legislature must be willing to work together and make difficult decisions.

2. Developing a comprehensive statewide evaluation system where none has existed before is a highly complex task A well informed legislature is crucial, but most legislative staffs are not geared up for this extensive detailed work in the area of education Prior awareness of potential problems, issues, and information needs could help considerably. Similarly, it is important that a competent State Department staff be assigned the job of carrying out legislative directives. Organizational structures and working procedures need to accommodate the changes associated with implementing a career ladder.

3. Political leaders are more apt to press for immediate solutions and prompt, visible action than educational leaders. Development and implementation of effective educational programs requires more time, and steps need to be taken to achieve an appropriate balance.

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PROJECT CONTINUATION
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The second phase of the project is presently being conducted Activities for this phase include: (1) Monitoring developments in the legislature; (2) documenting activities associated with field testing of the evaluation instruments for the career ladder; (3) collecting information regarding statewide teacher evaluation programs in other states; and (4) conducting field based case studies on the early implementation of the Career Ladder Program. A final report will be written analyzing developments and issues throughout this phase of the project as well as recommendations for decision makers involved in similar programs. A special Program Update will be made available in Fall, 1984 and at regular intervals as the Career Ladder Program gets underway.

We are interested in obtaining information and viewpoints from others who are involved with career ladder programs. Please call or write if you wish to share ideas, or if you would like further information about the project.

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CAREER LADDER UPDATE - OCTOBER, 1984

Late this summer, an overview of our first report, Shaping Tennessee's Career Ladder Program, was sent to you directly or through the Southern Regional Education Board (SREB). At that time, we expressed our intent to keep you and others with similar interests apprised of continuing developments as Tennessee's Career Ladder Program is implemented. Under U.S. Department of Education sponsorship, our project is currently in its second year, with a year-long field study of four school systems being added to other ongoing data collection activities. The project is expected to provide a uniquely comprehensive portrayal of emerging development and their impact at the school level.

The focus of this Update is to report findings from a series of interviews conducted this fall. School visitations occurred prior to the initial set of state evaluations of Career Ladder applicants in each of four diverse school systems selected for the case study. Teachers across grades K-12 and selected administrators comprised the interview pool in each locality. Detailed explanations of procedures and results will be published in the Part 2 report to be issued in late Spring, 1985. Inquires are welcome at any time, however, and we are committed to providing timely information to concerned individuals in Tennessee and other states.

The purpose of the first set of interviews was to determine how teachers and administrators perceived various components of the Career Teacher Ladder, including their current expectations, information sources, and attitudes. Subsequent interviews and surveys will probe their experiences and reactions relative to the Career Ladder evaluation procedures implemented in their local school systems. Effects of state level policy decisions will also be examined, as will local community perceptions.

The following question/answer overview represents a synthesis of the findings from teacher interviews at sixteen school sites. In reviewing this synthesis, it should be noted that: 1) most teachers had not yet received orientation manuals from the state; these were generally being distributed to Level II and III applicants during mid-October in-school meetings, and were to be mailed to other applicants subsequently; 2) evaluations of Level II and III applicants by state evaluators were beginning during or after the week of October 22, and procedures for determining which Level II and III applicants could be evaluated this year were finalized during the week of October 15; 3) guidelines for the state evaluation model, adopted by 122 local districts for use with all Probationary, Apprentice, and Career Level I teachers (as well as for those choosing the full evaluation "fast-track" option for 1984-85), were approved by the Interim Certification Commission and slated for State Board of Education consideration on October 26, 1984

Q: If you have questions concerning the Comprehensive Education Reform Act of 1984 (CERA), are you able to obtain answers from your principal, State Department of Education, or others?

A: Only sometimes. Nobody seems to know all the needed answers, and often the replies are inconsistent. The State Department of Education is in the position of working things out as they go along, so it seems to many people that the answers received this week may not apply next week.

Q: What are your feelings regarding the Career Ladder Test, whether taken as a "fast-track" option or anticipated as a requirement for Levels II and III? (It should be noted that the inclusion of the state test requirement became controversial in October when challenged by the Legislative Oversight Committee and the Tennessee Education Association.

A: We feel very anxious. The test included a lot of terminology not indicative of many experienced teachers' knowledge or practices. It is not possible to measure our ability to teach by this test, and many of us are insulted and hurt at being required to be tested after years of successful and dedicated service.

Q: How has teacher morale been affected by CERA?

A: Teachers are experiencing a great deal of individual tension and frustration, but the effects on school morale seem to vary depending on other aspects of teacher worklife. The perception is that morale is generally low and teachers feel unappreciated, particularly in relation to other professions.

Q: To what extent is TEA the voice of the teachers?

A: To a great extent! There was some perceived poor handling of the legislative effort last year, but the association is generally regarded as having helped make the program better for teachers.

Q: What are some strong points of the Career Ladder Program?

A: We're optimistic that it will help elevate our profession in the public's eye. Making evaluation a consistent part of our work is important, and we're not afraid of it. Staff development, especially, can be helpful to us as teachers.

Q: What do you foresee as the public's reaction or involvement once the program is implemented?

A: Parents can be expected, especially in some areas, to virtually swamp the principal with requests for Career Level II or III teachers. At the present time, however, they have little detailed information about what's happening, although they believe teachers are getting much larger salary increases than we actually are.

Q: What recommendations would you make to another state or school system that wants to adopt a career ladder?

A: Be better organized. Have the program ready and all the rules established before implementation begins. Teachers should be given thorough information about their personal options and other aspects of the program before it gets underway in the schools. They should be involved directly in the planning stages, not just to react to the work of others but to contribute the perspective gained from current classroom experience.

IMPLICATIONS:

Based upon the Fall, 1984 cycle of teacher interviews which have been summarized here, one can gain a sense of the early reaction to the Career Ladder Program in Tennessee. We feel that it is important for those considering or implementing similar programs to be kept up to date on the evolving attitudes and experiences that may be encountered as a change of this type is put into place. Future Updates will focus on other key groups involved in the implementation process, as well as re-visiting the question of teacher perceptions and experiences at a later date. The field study data synthesized at this time suggest such implications as:

1. If teachers can be convinced that the career ladder concept will really make a difference in the classroom and enhance their professional status, they appear willing to take in stride the resulting increase in demands on their time and energy. However, perceptions of administrative confusion or disrespectfor their professional contributions could well play a long term role in the extent to which qualified individuals take the steps needed to move beyond the lower rung of the career ladder.

2. As the implementation process moves further along, forces within each school seem likely to play an increased role in shaping teachers' reactions and experiences. Where school morale and working conditions are viewed as satisfactory, an emerging sense of camaraderie ("we're all in this together!") could be shaped into a positive force for successful implementation The same sense of group involvement, however, seems likely to operate in other settings as a source of negative peer pressure to resist the intrusion of an unwelcome program Building administrators, who have as yet been receiving information at about the same time as teachers, will be increasingly important as they provide leadership relative to the Career Ladder Program. With their own career ladder still in the field testing stage and with changes coming about in their teacher evaluation roles, however, school administrators are expressing serious concerns which could alter these key leadership behaviors.

3. The initial stages of career ladder implementation in Tennessee have been complicated by the provision for a variety of "fast-track" options for 1984-85 entry. Carrying out this aspect of the legislation has necessitated complex data collection and management procedures, created an involved set of deadlines and "special situations" that needed to be resolved, and led to communication difficulties that might well have been averted under other circumstances However, the complexity of the fast-track process would not itself account for all the reactions being expressed by teachers at this time. It will be vitally important to monitor those which persist as the events of the fast-tracking period recede, particularly if needed modifications are to be made while the program is in its formative stages.

We hope this Update has been of interest. Please feel free to contact us to share your ideas!

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CAREER LADDER UPDATE - FEBRUARY, 1985

INTRODUCTION

In our first Overview report, we focused on the origin and development of the Career Ladder Program in Tennessee, including the roles of the various individuals and groups in shaping the final legislation. A subsequent Update dealt with teacher perceptions near the start of the 1984-85 school year concerning the new Career Ladder. At the present time, teacher sign-up rates for the program have been substantial. With 46,000 plus teachers in the state, 26,132 have applied for Level I; 3,182 for Level II; and 5,205 for Level III. In addition, application figures indicate: librarians--1,100; counselors--772; and vocational education or other groups--315.

We are currently awaiting returns of a large-scale survey. This survey is being conducted to portray teachers' reactions in greater detail as the first year of Career Ladder implementation progresses. Legislative developments and actions of the Interim Certification Commission, the State Department of Education, and other key groups are also being tracked as the project continues. Contacts are being maintained, too, with the set of 18 elementary, middle/junior high, and high schools in the state serving as field sites for our case study.

With the Career Ladder Program still undergoing refinement, it seems an appropriate time to devote an Update report to the developments taking place on two key fronts: the State Legislature and the State Department of Education. For further details about the activities of these groups, readers are encouraged to contact us or get in touch with the offices listed at the end of this Update.

STATE LEGISLATURE

One year has passed since the Comprehensive Education Reform Act (CERA) was enacted. Tennessee's 94th General Assembly is currently in session, and it is certain that CERA -- the most hotly debated educational issue in the state's legislative history -- will be up for review. Since the major component of the reform legislation, the Career Ladder Program, is in the early stages of implementation, it is anticipated

that there will be virtually no major changes in the program this year. The State Department of Education is seeking some modifications that pertain largely to administrative handling of salary supplements and experience requirements. The Tennessee Education Association has its own list of proposed changes, ranging from eligibility provisions to removal of testing as a requirement for entering upper levels of the Career Ladder. Overall, general agreement seems to prevail in giving the Career Ladder Program and other components of CERA more time to reveal how well they will ultimately serve their intended purposes.

A major issue confronting legislators this year is the State's tax structure, and the need to find acceptable ways to provide continued funding for the education reform package. Appropriation for the first year's budget was $50 million. For the 1985-86 year, $85 million was requested. It is anticipated that $122.5 million will be requested for the 1986-87 year. The actual revenue allocation must be built into each year's budget, and its collection through appropriate tax measures needs to be assured.

During last year's legislative session, a controversial amusement tax was passed, for example, to help fund the education reform. However, a measure was also approved that would repeal one-third of the present sales tax on food over each of the next three years -- thus jeopardizing a substantial source of revenue that had long been counted on by the state government. A number of tax proposals will be debated before this session of the legislature concludes, and although extensive tax reform seems unlikely, it is evident that some changes must be enacted if the programs initiated under CERA are to remain viable.

Before turning attention from the current legislative activity, the work of the Education Oversight Committee should be noted. CERA established a monitoring group within the legislature to meet monthly and review the fiscal and procedural matters related to the education reform package. The ongoing work of the Oversight Committee has provided an additional means (beyond the standing Education Committees) for legislators to maintain close involvement with emerging issues relative to the Career Ladder.

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STATE DEPARTMENT OF EDUCATION
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Although major revisions are not expected in the education reform act itself, there have been some important changes recently in the State Department of Education. Under the leadership of Commissioner Robert L. McElrath, the Department has been substantially reorganized to align more closely with the various components of CERA. As part of this reorganization, for example, a new Career Ladder/Certification Division has been established. This Division handles a tremendous range of new responsibilities brought about by statewide implementation of the complex Career Ladder

Program for both teachers and administrators. It has been instrumental in explaining the program to various groups as well as managing the new incentive structure. To form this key Division selected personnel reassignments were arranged and several new positions were created to fulfill training, coordination, and other functions.

Perhaps one of the most positive factors associated with this reorganization effort is the clear acceptance of the need for improved communication between the State Department of Education and its local client groups. Crucial to the success of CERA, and perceived as a significant problem during the early months of implementation, is an efficient process for communicating accurate and timely information to teachers and administrators statewide. Both Governor Alexander and Commissioner McElrath have made a strong commitment to strengthening this vital area.

Pervasive rumors coupled with a rapid pace of implementation have at times made the Career Ladder appear to many teachers as an ever-changing program. However, its essential elements have remained intact. Steps being taken to help clarify the program and explain needed modifications include direct mailings to teachers' homes of materials such as Tennessee Education. This State Department publication now includes a column responding to some of the more prevalent "rumors" or misinterpretations heard around the state. In addition to written information, the Department has built into the reorganization process a re-assignment of some of its district office personnel to liaison roles with the local school systems.

A program developed by the State Department of Education to help meet existing staff development needs has emerged as an unexpectedly important factor in the Career Ladder implementation process. The Tennessee Instructional Model (TIM) is a series of modules designed for staff development, covering such topics as: planning (e.g. levels of thinking; task analysis); classroom management (e.g. time on task, classroom climate); instructional strategies (e.g. modeling, set, closure, learning styles); and evaluation (constructing tests, reporting results). The TIM package was approved by the State Board of Education for use by local school systems in providing teachers with an acceptable way to "fast-track" onto the Career Ladder during 1984-85 via the staff development option (one of five possible "fact-track" methods). For a variety of reasons, including a widespread view that knowledge of TIM is implicitly needed to do well in the Career Ladder evaluation process, many more teachers are participating than the number taking the 40 hour training to fulfill a "fast-track" requirement. This view is not technically accurate, and the Career Ladder evaluators themselves have not generally had TIM training. Yet, there are enough parallels between the principles stressed in TIM and the practices being assessed for the Career Ladder to make teachers perceive the staff development modules as, at minimum, a useful "refresher course". While concerns do exist and revisions of the modules are planned, current indication is that the State Department of Education has created a staff development program that will continue to win a great deal of support statewide.

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CONTACT RESOURCES
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For further information about developments concerned with the Career Ladder Program, this brief list of contact persons may provide a helpful starting point:

State Department of Education

Commissioner of Education
Dr. Robert L. McElrath
100 Cordell Hull Building
Nashville, TN 37219
(615) 741-2731

Assistant Commissioner
Dr. Carol Furtwengler
112 Cordell Hull Building
Nashville, TN 37219
(615) 741-7816

Assistant Comissioner-General Education
Dr. Charles Carrick
100 Cordell Hull Building
Nashville, TN 37219
(615) 741-1716

Executive Director-Interim Commission
Dr. Russell L. French
Career Ladder/Certification Division
111 Cordell Hull Building
Nashville, TN 37219
(615) 741-7816

**The activities being conducted for this project are part of a grant sponsored by the U.S. Department of Education, Secretary's Discretionary Fund.

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INTRODUCTION
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This UPDATE represents the fourtn of a series of short reports issued since Summer, 1984. The series was initiated to provide pertinent, timely information to a broad network of educators and governmental policymakers interested in career ladders and other forms of incentive programs. Each UPDATE has focused on a specific phase of Tennessee's Career Ladder Program for teachers, from initial formulation and legislative passage through its first year of implementation. Data presented in these periodic reports has been gathered as part of a 20-month project sponsored by the U.S. Department of Education and conducted at the University of Tennessee, Knoxville.

The Tennessee Career Ladder Program has received considerable attention as one of the first statewide programs to be enacted. It remains one of a select number of such reform efforts to have developed a uniform framework for evaluation and advancement, rather than leaving to local district initiative the creation of the specific incentive program in use. Tennessee's model does include local involvement in evaluation at the Probationary, Apprentice, and Level I stages of the teacher career ladder, subject to state guidelines and approval. Access to the two upper rungs (Levels II and III), corresponding generally to at least eight years of teaching experience for applicants, is strictly governed by intensive state-conducted evaluation procedures.

During the 1984-85 school year, these procedures moved from the field testing and revision stages into full implementation in the schools. Using a one-time process referred to as fast-tracking, individuals currently teaching and who met basic eligibility requirements could apply for entry to Level I via one of five routes (discussed later in this report). A salary supplement or "bonus" of $1000 was earned by those attaining Level I status. As of the end of April, new figures for teacher Career Ladder sign up indicated that most teachers eligible for Level I applied (27,072). Fewer of those eligible chose to apply for advancement to the upper two career levels during this first year of implementation (7,743 applied). It should be noted that for future teachers and those whose Tennessee service began with the 1984-85 school year, participation in the Career Ladder Program is mandatory.

Consistent with the objectives of the federally funded case study, several activities designed to portray career ladder implementation were undertaken. Beginning in September, 1984, eighteen schools in six school systems were selected as field sites for fall and spring interviews involving

150 teachers as well as building administrators. Additionally, a comprehensive survey was mailed to a stratified sample of 2105 teachers across the state. This instrument, distributed in February, 1985, was used to determine teachers' experiences with the career ladder as well as their reactions to its features and conceptual bases. Results of these two major data collection activities are highlighted in this UPDATE, with detailed findings to be released later this summer in the final project report (Part II: Shaping Tennessee's Career Ladder--1985).

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INTERVIEW RESULTS
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The field site interviews were designed to ascertain how the program was being implemented in various types of school districts and how it was perceived by teachers and administrators. Two sets of interviews (Fall and Spring) were conducted in each school, so that key events and changes could be portrayed. Documenting initial reaction and describing developments associated with the early operation of the career ladder program were believed to be especially important for helping those in other states learn from all facets of the Tennessee experience.

The six school districts cooperating in this project were selected to represent a variety of demographic characteristics including geographic location, type of community, and general socioeconomic level. In each district elementary, middle or junior high and high school levels were represented, with a total of eighteen schools participating. Letters and telephone calls were used to maintain contact between site visits.

A high degree of consistency was evident in the responses obtained across districts. Teachers expressed considerable reluctance to climb beyond Level I of a career ladder that they generally regarded as being in an unfinished state. Their collective comments indicated that not being sure what to expect regarding the new statewide evaluation process (e.g. how various components would be assessed) and being uncertain about the responsibilities they would be expected to assume (e.g. under extended contract provisions for Levels II and III) were common sources of concern. These concerns were not substantially different in the Spring interviews as compared with the Fall data.

The pace of implementation and the difficulty of establishing clear statewide communication were underscored through the interview data as perceived areas of difficulty. Teachers and administrators reported numerous experiences leading to feelings of confusion and frustration. In some cases, the situations perceived as changes in the career ladder program were actually unforeseen special cases requiring decisions about eligibility or comparable issues. As situations arose requiring clarification or revision, interview respondents reported receiving delayed or inaccurate

information. Their responses indicated that state evaluators and other staff representing the State Department of Education were found to have incongruent information on procedures and requirements. Adding to the reported problem was the fact that local school district officials also became bearers of outdated or inaccurate information often enough to represent a major concern of teachers and principals interviewed.

After these communication problems arose in the Fall, there were energetic State Department efforts to strengthen this critical area. Among those interviewed, communication was still regarded as a key concern in the Spring, particularly in the rural schools visited. While more teachers now mentioned receiving mailings from the State Department and other sources, there were indications that the peer "grapevine" was still a primary information source in these schools.

Interview respondents were generally supportive of the concept of performance evaluation, but their comments about the specific process developed for Tennessee contained several recurrent themes. There was concern that the procedure as carried out by some evaluators did not provide adequate post-observation feedback. There was also a common worry that it would be too easy under the present program for outside evaluators to misjudge a situation or even to be intentionally misled. Negative reaction was most prevalent concerning the portfolio required for Levels II and III, which was to include documentation of specific aspects of performance across a five-year period. In addition to the preparation required and the perceived weak relationship to teaching behavior, respondents in nearly all schools reported being concerned that factors beyond their control (e.g. lack of leadership opportunities, inadequate resources, burdensome workload) would unfairly decrease their chances of success.

One of the most positive elements associated with the Career Ladder Program was reported to be the staff development model known as TIM (Tennessee Instructional Model). Although not orginally created for the career ladder, its inclusion as a fast-track option for the 1984-85 school year brought many teachers into contact with the TIM training modules. These were found by numerous respondents to provide a useful review or pulling together of management, planning, and other aspects of instruction. The primary criticism voiced in relation to TIM was its adherence to a specific approach that seemed to these individuals to limit its applicability to diverse teaching situations.

When asked during the interviews what critical elements should form the basis for recommendations to other states or districts, the most frequent responses underscored the importance of teacher input at the planning stage. Their suggestions focused also on ways to reduce the paperwork and duties that were perceived as burdensome, as well as increasing salaries to levels more appropriate for their training and responsibilities. During the Spring interviews, teachers and administrators reiterated earlier recommendations and stressed in addition the critical need for improved measures to ensure

evaluator skill and consistency. Steps taken to clarify purposes, streamline procedures, and slow the pace of implementation were also deemed quite important.

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SURVEY RESULTS
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The survey instrument developed for this phase of data collection concentrated on three major areas: communication, the fast-tracking process, and evaluation procedures. Participating schools were selected from each of the eighteen Teachers' Study Council regions. This selection process yielded a stratified sampling which resulted in 54 schools equally balanced across grade level categories. Based on faculty counts within the selected schools, 2105 surveys were distributed.

When all returns were received, there were 1039 teacher responses. The first step asked respondents to assess the quality of communication they had received about the Career Ladder Program. Results indicated a substantial level of concern, with 40% specifying "some concerns" and 23% "strong reservations" [(The other two response options were "generally favorable" (33.7%) and "very positive" (3.3%)]. In order to obtain the most specific and accurate information possible about the communication that took place, those surveyed were asked several questions about eleven common data sources (e.g. State Department Mailings, School System Central Office, Tennessee Education Association Staff). Their responses included: whether they had used each source, whether they obtained the information sought, and whether the information was accurate, as well as examples or comments they wished to provide concerning the specific data sources.

The sources of Career Ladder information that were reported as being used most often were: peers (80.7%), TEA Mailings (76.1%), principal (77.3%), and State Department Mailings (73.6%). School principals were felt by the highest percentage (49.1%) to have provided the information sought. Assessments of information accuracy resulted in a similar ranking of data sources. The highest totals for data sources rated as at least "sometimes" accurate were: peers (62.9%); principal (63.9%); TEA mailings (62.9%); State Department Mailings (57.6%).

Results concerning communication sources and quality were generally consistent across grade levels and eligible career levels of survey respondents, and closely paralleled total sample results. When written comments were analyzed in addition to the structured items discussed above, a more strongly negative pattern was evident. Of 109 comments made concerning the role of the State Department--Nashville Staff as a data source, for example, 78% pertained to inaccurate, delayed, or in other ways not useful information. Another 15.6% of comments described experiences or reactions related to unavailable information from this data source,

which elicited the greatest number of comments concerning communication. The second highest frequency of comments on this subject was 66% in reference to the State Department Mailings as a data source. Here, 90.9% of the comments described communication as not useful, inaccurate, late or unclear, with 7.6% reporting helpful information received. Among the other nine data sources listed, no single category was the subject of over 41 comments. Those for which the positive comments exceeded the negative were: principal; Teachers'Study Council; and TEA Mailings.

A second major focus of the instrument was the fast-tracking process used for 1984-85 to facilitate qualification of eligible teachers for Career Level I. This process, in which 83.3% of the 1039 survey respondents reported participating, required successfully completing one of five options: National Teachers Examination-Core Battery; National Teachers Examination-Specialty Area Test; Tennessee Career Ladder Test; Staff Development; or Full Evaluation. Regulations governing each option were set forth in terms of cutoff scores, duration and nature of training or assessment experiences, and other necessary aspects. The fast-tracking concept was positively regarded by the survey respondents, with 30.4% indicating their views were "very positive" and 35.5% "generally favorable". Only 7.1% indicated "strong reservations" concerning this concept, with 18% marking "some concerns" and 9% not responding.

Respondents were also asked to indicate whether or not they had experienced each of the five fast-track options, and to list strengths and weaknesses of each. It should be noted that applicants could have participated in more than one option. Staff development was respondents' most commonly chosen option (44.3%), followed by the Career Ladder Test (32.6%), NTE-Specialty Area Test (16.6%), NTE Core Battery (10.2%), and Full Evaluation (8.2%). There was considerable variability across regions of the state in terms of fast-track options selected. Less response diversity occurred, however, when results were analyzed across grade levels or eligible career levels.

In the section where respondents were asked to separately list strengths and weaknesses of each fast-track option, comments were most frequently made regarding the Staff Development option (237). Next in frequency were the Career Ladder Test (203), NTE-Core Battery (161), NTE-Specialty Area Test (150), and Full Evaluation (87). Respondents making comments were most positive about the Staff Development option, with 57.8% stating in various ways that it was appropriate for its purpose, helpful to teachers, or a good training experience.

Remarks concerning the other options were more negative in each case. The National Teachers Examination-Core Battery was felt to be an inappropriate measure by 60.3% responding to this item, with another 14.3% critical of its content and 7.5% critical of its length. The Specialty Area Test was similarly regarded, although in this case 25.3% found the content to be a positive feature, 16.7% thought it negative, and 46.0%

found the test inappropriate for the purpose. A comparable level of dissatisfaction with the Career Ladder Test was expressed by the 203 respondents who commented on it, of whom 54.7% found it inappropriate for the purpose. When all positive comments concerning this instrument were tallied, they accounted for 11.3% of the total for that option.

The third major portion of the survey dealt with the statewide evaluation process developed for the Career Ladder Program. Before addressing their experiences with each component of that process, respondents were asked to indicate the degree to which they favor the concept of a statewide teacher evaluation process. Overall, results reflected a low level of support for the concept, with 39.2% marking "some concrens," 25.7% "strong reservations," 22.2% "generally favorable," and only 7.0% "very positive" (5.9% no response).

A second general question asked how familiar respondents felt they were with the fit or relationship between local and state evaluation. In the Tennessee program, evaluation for Probationary, Apprentice, and Level I status is conducted by the local districts under state guidelines and monitoring, while the state takes over fully for Levels II and III. Most teachers expressed at least general familiarity with these relationships (61.0%, of which 15.5% felt "very familiar").

Respondents' experience with the seven components of the career ladder evaluation process varied, particularly in view of the fact that the state evaluation teams had not yet completed the full three-visit cycle (including portfolio review) with most Level II and III applicants. The evaluation component with which teachers reported the highest degree of experience was classroom observation (45.1%), while fewer than 10% reported that they had experience with either student questionnaires, interviews, or portfolios in this context.

There were spaces provided on the survey instrument for respondents to list strengths and weaknesses of each career ladder evaluation component. Their comments were analyzed to develop categories and tabulate responses within these. The components eliciting the greatest number of comments were: observation (187); Professional Skills Test (149); peer questionnaire (147); and portfolio (146).

Comments concerning the classroom observation were approximately evenly split between strengths (50.8%) and weak points (49.2%). The strengths most frequently cited dealt with usefulness or appropriateness of the observation and its ability to provide helpful feedback to the teacher. The weaknesses mentioned pertained to its being a poor measure of teaching ability and a technique prone to subjectivity or faulty execution.

Nearly all of the 132 remarks about the student questionnaire used in career ladder evaluation were negative. This instrument was intended as a tool that could focus students' attention on actual behaviors rather

than general impressions. Although most respondents had not yet directly experienced this particular procedure, 34.9% felt it was not appropriate, too subjective, or a poor use of time, and another 34.1% judged it to be a weak measure of teaching performance. However, 20.5% listed strengths such as providing useful feedback to the teacher and being a good idea for gathering evaluative data.

Two-thirds of the comments regarding the peer questionnaire, a tool administered to three colleagues (chosen from a list of six submitted by the applicant), gave weaknesses perceived in this procedure. Most of these weaknesses concerned a lack of clear relationship to teaching performance and a high level of subjectivity or potential bias.

Responses pertaining to the principal questionnaire, a form to be filled out concerning the applicant's performance, revealed a distinct split of opinion. While 51.4% of the comments were positive and found this to be an appropriate data source, the other 48.6% of the 103 comments gave opposite views.

The response pattern for the Professional Skills Test as an evaluative tool showed the same type of negative pattern as the student questionnaires. There were fewer than 20% positive comments about this data source, while 45.0% felt it was a poor way to measure teaching ability and another 36.2% indicated other weaknesses related to the test.

The candidate interview was dropped from the career ladder evaluation process shortly before the surveys were distributed. This action resulted from a controversy surrounding the access some teachers had been found to have (largely through TEA workshops) to a field test version of the rating scale used to score the interview. These interviews typically lasted several hours, and teachers frequently reported devoting extensive preparation to assemble documentation for their responses. When survey comments were analyzed, there were nearly twice as many negative (65.5%) as positive (34.5%) responses. Those who were positive felt that the idea was good, and the interview could provide useful information and serve a helpful purpose. The largest number of weaknesses identified dealt with the perceived subjectivity, inappropriateness of purpose, and excessive time requirements of the candidate interview as a data source for the career ladder evaluation process.

The final data source was the portfolio of sample lessons, examples of leadership activities, and other specified types of documentation. This technique was the subject of numerous comments, most of which (83.6%) were unfavorable. Respondents felt that the portfolio required too much time (39.0%), was too subjective or contrived in nature to be a useful source of feedback (20.6%), or was an inappropriate measure of teaching ability. It should be noted that at the time of the survey, actual portfolio reviews had just recently begun by state evaluators. Thus, respondents were largely noting strengths and weaknesses based on their experiences in getting

portfolios ready to be assessed, or based on their understandings of what the portfolio entailed and why it was being utilized as a data source.

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SUMMARY
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The results of two major data collection efforts have been highlighted in the preceding sections. They are currently being pooled with other important sources of information to develop an overall portrayal of the processes and issues associated with implementing a teacher career ladder in Tennessee. This portrayal, including recommendations and implications, will be presented later this summer in the final project report. It is possible, however, to identify several generalizations based on the two data collection activities reported here:

1. Teachers have tended to trust and rely more heavily on local than distant sources of information about the Career Ladder Program, despite the fact that the program is being directed and shaped at the state level. Early communication problems engendered a negative expectation regarding information received from state level agencies. Although corrective steps have been taken to decentralize and improve communication, these have not been completely successful according to data obtained as late as April, 1985.

2. Fast-tracking, a system built into the Tennessee legislation to permit eligible teachers to gain relatively expedient entry to the career ladder, was favorably regarded as a concept by survey and interview respondents. However, when operational features of the fast-track process were discussed, there was considerably less satisfaction. Given the short time for program implementation and the complexity of the fast-tracking system (e.g. five options with varying procedures, deadlines, time requirements, and costs), communication breakdowns and confusion over rules could be anticipated. These problems proved damaging to overall perceptions about the program.

3. While teachers in the study supported the need for performance evaluation, they seemed quite concerned as a group about having a statewide evaluation process. Their analyses of the Career Ladder evaluation system pointed to several important criteria. Teachers want evaluation tools that; show a clear relationship to teaching performance and expectations; are resistant to bias on the part of students, colleagues, or administrators; and are reasonable in the demands on their time. Prior to widespread first hand experience with all parts of the evaluation process, teachers gave mixed assessments of the classroom observation and the principal questionnaire. They identified considerably more weaknesses than strengths in the other five evaluation data sources. It will be interesting and important for these assessments to be studied further as implementation of the Tennessee Career Ladder Program continues into its second year.

APPENDIX B

OVERVIEW OF CAREER LADDER

Reproduced from: Teacher Orientation Manual 1984-85, Tennessee Department of Education, 1984.

NEW TEACHERS AFTER JULY 1, 1984

CAREER LEVEL	YEARS OF EXPERIENCE TO QUALIFY	CERTIFICATE LENGTH AND DURATION	WHO EVALUATES?	CONTRACT DURATION	STATE SALARY SUPPLEMENT
Probationary	0	One-Year Nonrenewable	Local	10 Month	0
Apprentice	1	Three-Years Nonrenewable	Local State - 3rd Year Review	10 Month	To Be Determined By State Board of Education
Career Level I	4	Five-Years Renewable	Local - 2 times in five years State - 5th Year Review	10 Month	$1,000
Career Level II	9	Five-Years Renewable	Local - Once in 3 Years State - two times during five-year period	10 Month 11 Month	$2,000 $4,000
Career Level III	13	Five-Years Renewable	Local - Once in 3 Years State - two times during five-year period	10 Month 11 Month 12 Month	$3,000 $5,000 $7,000

TEACHERS EMPLOYED AND CERTIFICATED AS OF JULY 1, 1984

CAREER LEVEL	YEARS OF EXPERIENCE TO QUALIFY	CERTIFICATE LENGTH/DURATION	WHO EVALUATES?	CONTRACT DURATION	STATE SALARY SUPPLEMENT
Career Level I	3* Years	5-Year Renewable	Local - Minimum of two times in 5 years State Review - 5th Year	10 Month	$1,000
Career Level II	8** Years	5-Year Renewable	Local - Once in 3 Years State - 2 times in 5 years	10 Month 11 Month	$2,000 $4,000
Career Level III	12*** Years	5-Year Renewable	Local - Once in 3 Years State - 2 times in 5 years	10 Month 11 Month 12 Month	$3,000 $5,000 $7,000

*Teachers with less than three years of experience who were employed and certified on July 1, 1984 may apply for Career Level I Certification when they obtain the three year experience and other applicable requirements.

**Teachers with less than eight years of experience who were employed and certifed on July 1, 1984 may apply for Career Level II certification when they obtain the eight year experience and other applicable requirements.

***Teachers with less than twelve years of experience who were employed and certified on July 1, 1984 may apply for Career Level III certification when they obtain the twelve year experience and other applicable requirements.

APPENDIX C

EVENTS OF THE 1984 SPECIAL SESSION

TEACHER INCENTIVE/CAREER LADDER LEGISLATION
93RD GENERAL ASSEMBLY, STATE OF TENNESSEE
Special Session, January 10 - February 23, 1984

Week of January 9

In the opening week of the special session major bills were introduced. Several preliminary skirmishes took place, such as the Senate Democratic Caucus vote to enlarge two key committees.

January 9. Finance Commissioner Hubert McCullough presented the administration's $5.1 billion 1984-85 budget request during a briefing for news media. The budget calls for $351 million in new taxes including a 1 cent increase in state sales tax (projected to raise $281 million), extension of the sales tax to amusements, and an increase in business taxes. The increased revenues will pay for education improvements (elementary and secondary education, $145 million, and higher education, $140 million) and other improvements. For list of education improvements, see 1984-85 Budget Highlights, State Department of Education Memorandum, January 12, 1984.

January 10. The special legislative session opened. Governor Lamar Alexander addressed a joint session of the General Assembly, urged passage of his better schools program, and assumed responsibility for the tax increase to fund it.

The Senate Democratic Caucus voted to expand the Senate Education and Finance Committees to 16 members each so that all members of the Senate could participate in deliberations. Lieutenant Governor Wilder will appoint new members and will sit on both committees.

Most of the education bills were introduced either on January 10 or January 11. SB 1, HB 1, the Comprehensive Education Reform Act of 1984, (hereinafter referred to as the education reform act or bill) recommended by the Select Committee on Education and endorsed by the administration,

provides for a 5-step career ladder, (probationary, apprentice, professional, senior, and distinguished senior teacher) salary supplements of $1,000 to $7,000, evaluations for purposes of advancement on the career ladder and recertification by regional and state certification commissions, teacher aides for grades 1 - 3, and improved teacher training programs.

Sponsors are Senators John Rucker-D, Anna Belle Clement O'Brien-D, Buzz Elkins-R, and Representatives Steve Cobb-D, Steve Bivens-D, and Dana Moore-D.

SB 2, HB 13, the Education Excellence Act of 1984, originiating with minority members of the Select Committee on Education and endorsed by the Tennessee Education Association Board of Directors (and hereinafter referred to as the TEA bill), provides for a 4-step career ladder (entry level, professional, career level I, and career level II teacher) with reduced time for advancing on the ladder, evaluation by the local school system subject to collective bargaining, and reduction in class size. Sponsors are Rep. Paul Starnes-D and Sen. Joe Crockett-D. For comparisons of the two measures, see "Comparison of Major Sections of Educational Reform Legislation", prepared by the staff of the Senate Education Committee; also the TEA Legislative Report, Vol. II, No. 1, week ending January 13, 1984. See also analysis of SB 1 in Tennessee School Boards Bulletin, Vol. I, No. 5, January 1984.

A third bill, SB 16, HB 19, the Public Educational Governance Reform Act of 1984, pertains to career ladder legislation. This bill, proposed by Lt. Gov. and Speaker of the Senate John Wilder-D, creates a new State Board of Education which will have responsibility for policy making; the Commissioner of Education will retain administrative functions. (Subsequent amendments to the education reform bill gave responsibilities to the new State Board of Education for the implementation of the career ladder program).

January 11. Attorney General William Leech addressed the House Finance Committee regarding the constitutional spending limitation. Under an amendment effective in 1978, state spending may not increase at a rate higher than the growth in personal income in Tennessee "unless the General Assembly shall, by law containing no other subject matter, set forth the dollar amount and the rate by which the limit will be exceeded." HB 6, SB 13, proposed by the administration, states the constitutional restriction is being exceeded by $50.7 million (based on growth since 1978). Leech advised legislators to figure the increase on a year-to-year basis and use the figure $190 million.

Week of January 16.

The House and Senate Education Committees began discussion of the education reform bill and the TEA bill. Simultaneously, TEA representatives and House sponsors began negotiations in Speaker McWherter's office. At the end of the week McWherter announced a compromise regarding local evaluations of probationary, apprentice and career level I teachers.

January 16. An analysis of the TEA bill prepared by Bill Koch, the Governor's legal counsel, suggested that the bill removes teacher evaluation from the state and makes it subject to collective bargaining, would allow the TEA and local teacher groups to recommend to the Governor nominees for the teacher certification commission, and would complicate the due process requirements relating to lawsuits arising out of the plan.

January 16. House Speaker McWherter called together Rep. Cobb, (sponsor of the education reform bill), TEA lobbyist Betty Anderson, TEA President Marjorie Pike, Rep. Paul Starnes (sponsor of the TEA bill), Rep. Steve Bivens (chairman of the Select Committee), and Billy Stair (legislative staffer to the Select Committee) for the first of a series of closed meetings to discuss areas of disagreement.

January 17. The Senate Education Committee began hearings on the two bills. Sen. Rucker presented SB 1. Sen. Crockett presented SB 2 but then announced that he did not intend to try to move the TEA bill over the administration backed bill, but suggested that the TEA bill be viewed as a way of improving SB 1. (House sponsors of the TEA bill later voiced disagreement with Crockett.) The committee also questioned Bill Willis, Chairman of the Ad Hoc Interim Certification Commission, and Education Commissioner Robert McElrath.

January 17. The House Education Committee also began hearings on the two bills. Rep. Cobb discussed the education reform bill section by section and responded to members' questions.

January 18. In the third meeting of TEA representatives and House education reform bill sponsors, agreements were reached on a number of minor issues such as changing the names of the career ladder levels from professional, senior and distinguished senior, to career levels I, II, and III and giving local schools time to bring a teacher deemed incompetent up to standards. The key issue, not yet resolved, is whether evaluations of teachers for purposes of incentive pay should be handled by local school systems--as the TEA prefers--or by the state--as the education reform bill provides.

January 19. McWherter announced a compromise that he intended to promote, whether or not the administration or the TEA agreed to it. Local school systems would handle evaluations at the probationary and apprentice levels and at the first step on the career ladder, provided the state approved their evaluation criteria and methods. Local school personnel would do the evaluations, but the state would have the right to review all evaluations and challenge any it found suspect. In the case of disagreement, the regional certification commission would decide. Its decision could be

appealed to Chancery Court, as the education reform bill now provides. The House sponsors accepted the compromise, but the TEA did not. The TEA is concerned that state control over evaluation for entry onto the career ladder, which occurs at the same time that local school districts must decide whether to grant a teacher tenure, effectively usurps local control over tenure. There has been considerable discussion in the education committees on this point. Granting tenure is a local function and granting certification is a state function; however, the two concepts come together in the bill because if a teacher does not receive certification a teacher cannot teach.

Week of January 23

The House and Senate Education Committees passed the education reform act with the Weakley County Amendment regarding local evaluation. TEA efforts to amend the bill failed. Further negotiations produced a compromise and the TEA Board of Directors endorsed the tentative agreement.

January 23. The House Education Committee continued section by section discussion of education reform bill. W. James Popham, testing expert at UCLA, testified that the incentive pay plan is "potentially the finest evaluation system for educators I know." Rep. John Bragg-D, Chairman of the House Finance Committee, announced he intended to amend the bill to include goals to be attained over five years, such as decrease in teacher turnover, decrease in high school drop out rate, and increase in student achievement. Rep. Paul Starnes presented the TEA bill, with little discussion.

January 24. The House Education Committee passed the education reform bill with amendments. The 42-page comprehensive amendment, known as the "Weakley County Amendment," after its architect, Speaker Ned Ray

provides that local education agencies evaluate personnel at the probationary, apprentice, and career I levels in accordance with locally developed evaluation criteria and procedures based upon standards and guidelines recommended by the State Certification Commission and approved by the State Board of Education. Local evaluation procedures must be approved by the State Board of Education before they are used. In addition, the comprehensive amendment changes the name of professional, senior and distinguished senior teacher levels to career levels I, II, and III; adds a career ladder for assistant principals; places final authority in the State Board of Education for approval of the evaluation process and certification of educators under the career ladder; and for purposes of implementing the career ladder for current teachers, provides for teachers to enter the ladder by passing one of three tests or by being evaluated under provisions of the act. The House Education Committee also added other amendments reducing class size in first grade from 25 to 15 beginning in 1985-86 (by a vote of 9-8); allowing local boards to use money allocated for teacher aides in grades 1, 2 and 3 to hire full-time teachers if they see fit; and allowing part-time and substitute teachers to qualify for incentive supplements.

Cobb successfully moved to table 11 TEA-sponsored amendments offered as amendments to the Weakley County Amendment by Rep. Paul Starnes. The amendments would have grandfathered in some teachers using prior NTE scores; substituted one course for the two courses required every five years for continuing certification on the career ladder; protected the rights of teachers on leave of absence and teachers on preferred re-employment lists; extended certain rights and privileges (such as retirement) to probationary teachers by substituting the words "temporary certificate" for "license"; allowed negotiations to cover probationary teachers;

provided a program of staff development as an alternative for entering the career ladder; and allowed the legislative oversight committee to hear complaints from teachers about the evaluation process. Cobb moved to table each of these amendments saying that he was concerned about unintended consequences of the amendments since he had not had the opportunity to study the language of the amendments. (However, modified forms of all but the last of these amendments were subsequently incorporated into the legislation.)

The amended bill passed the committee 11-3-3 as follows: Aye: Givens-D, Cobb-D, Ray Davis-D, Elsea-R, Hassell-R, Herndon-D, Kelley-R, McNally-R, Dana Moore-D, Whitson-R, and Wood-R. No: Chairman York-D, Stallings-D, and Jared-D. Not voting: Starnes-D, C. B. Robinson-D and Alvin King-D.

January 24. Representative Tommy Burnett-D proposed another compromise regarding evaluations that he said was acceptable to the TEA. Like the Weakley County Amendment, it provides for entry level evaluations to be performed at the local level, with the state having final authority. However, if teachers wanted to stay at career level I--with its $1,000 supplement--they could be re-evaluated by the local school system without the state having final authority. The bill's sponsors said the proposal was unacceptable. Burnett said it was necessary in order to get the TEA support required to pass the taxes.

January 25. The Senate Education Committee passed the education reform bill with amendments. After a long debate on the comprehensive Weakley County amendment, the amendment passed 13-1-3. The Senate version contains language saying that the education reform bill and the Professional Negotiations Act will not affect each other. Sen. Fulcher, sponsor, wanted to keep the evaluation process free of collecting bargaining. Sen. Crockett presented six of the TEA-sponsored amendments; each was tabled. The committee added

other amendments providing for local school systems to adopt state-approved evaluation systems for all teachers, not just those on the career ladder; providing aides for kindergarten teachers in the same ratio as the bill provides for grades 1-3; placing the State Certification Commission on the sunset cycle, to be reviewed in 1988; clarifying the intent of the legislation that local school boards have the authority to determine whether or not a career level II or III teacher will be hired to work for the 11th or 12th month; distinguishing between the portion of the pay supplement that is paid for outstanding performance from the portion paid for extra months of service (this was done to address the concerns of Senators Albright-R and Wilder-D, who did not want teachers performing "make work" if there were no real duties to be performed for the local school system); and requiring evaluation criteria to be validated and tested to eliminate racial or sexual bias. The bill passed the committee 11-5-1 as follows: Aye: Albright-R*, Burleson-R*, Elkins-R, Longley-R*, Moore-D*, Parson-R, Rochelle-D*, Rucker-D, Shockley-R*, Wilder-D, and Chairwoman O'Brien-D. No: Burks-D, Crockett-D, Davis-D*, Kyle-D*, and Lashlee-D. Absent: Williams-D. (Newly appointed members are marked with an asterisk.)

Crockett then moved the TEA bill (SB 2) which failed 4-10-2.

The education reform bill thus moved from the House and Senate Education Committees to the House and Senate Finance Committees to be taken up the following week.

January 26. Both the Senate and the House Education Committees passed the Public Educational Governance Reform Act (SB 16) with virtually no opposition.

January 26. A tentative compromise was reached among House members and TEA officials after two days of line-by-line review of the legislation presided over by Rep. Burnett-D. Participating were Representatives Cobb-D, Jim

Henry-R (House Minority leader), Kelly-R, and Starnes-D, and TEA's Betty Anderson, Marjorie Pike, Cavit Cheshier (Executive Secretary) and Bryan McCarty (attorney). The agreement in principle includes: TEA support of state review of local evaluations of teachers entering the career ladder (the Weakley County Amendment); an across-the-board raise for teachers of more than 10% made possible by reducing the $1,000 career level I supplement; eliminating the use of the National Teachers Examination or other test to "fast track" current teachers into the proposed career ladder in 1984-85 (an estimated 34,000 of the state's 46,000 teachers could be fast tracked and receive the $1,000 supplement); making indefinite the toe-in-the-water provision allowing current teachers to try out the career ladder but return to the old system (the bill provided that current teachers could only opt out of the career ladder within the first five years); and clarifying language to protect existing rights under the Professional Negotiations Act and the tenure law. However, Senate sponsor John Rucker announced he could not accept the reduction of the $1,000 incentive supplement for career level I.

January 27. Governor Alexander gave his State of Education address to the Tennessee Press Association, praised Democratic legislative leaders, and said, "In the effort to find more money for across-the-board pay raises for teachers, it would be unwise to take away the incentives that make joining the career ladder attractive."

January 27. State Attorney General William Leech issued an opinion saying that local governments have the right under state law to raise their sales taxes to a rate equal to half that of the state's. (Legislation submitted by the administration specifically prohibits local governments from raising their taxes in conjunction with the proposed state increase.)

January 28. The TEA announced at a news conference that its Board of

Directors had endorsed the tentative agreement. Rep. Cobb, Bryan McCarty (TEA attorney), and Bill Koch (Alexander's legal counsel) began meeting to draft amendments. McCarty had not participated in drafting the Weakley County Amendment.

Week of January 30

The bills moved from the education committees to the finance committees this week. The House and Senate Finance Committees approved the education reform bill (with amendments incorporating the agreements reached the previous week) and the sales tax increase required to fund education improvements.

January 30. Cheshier and Cobb met with the House Finance Committee to explain the compromise and urge support of it.

January 31. The Senate Finance Committee passed the Public Educational Governance Reform Act (SB 16). Wilder said the new State Board of Education is needed to develop a master plan for K-12, to make policy, to monitor progress and student performance, and to represent the interests of K-12 (in the past only the TEA had done so, he said) before the legislature. The education reform bill has been amended to lodge final authority for the career ladder with the new State Board of Education. The new State Board of Education would function as a planning board for K-12, as the Tennessee Higher Education Commission has for higher education. Amendments were added that provided for the board to elect its own chairman; provided for the State Board of Vocational Education to retain its present authority over vocational education, with the Assistant Commissioner for Vocational Education reporting directly to the state board; and changed the beginning date from July 1 to April 1, 1984 so that the board could begin oversight of the career ladder program.

The Senate Finance Committee adopted amendments to the education reform bill already approved by the Senate Education Committee (after lengthy procedural

wrangling) and then began discussion of the new 11-page amendment resulting from the agreements made over the weekend by House sponsors and the TEA. Rucker said the Senate sponsors have agreed to accept all of the items agreed to by the House sponsors except two: reduction of the $1,000 incentive pay supplement to provide additional money for an across-the-board pay raise and elimination of the "fast track" portion of the phase-in period which gives teachers the option of taking a test to gain entry to career level I. The amendment Rucker presented to the committee extends the "toe-in-the-water" provision to allow teachers an unlimited period of time to decide to withdraw from the career ladder program as opposed to the 5-year period in the present bill; permits a teacher who is denied entry into career level I to start over again as a probationary teacher in another school system (thus diluting the "up or out" feature of the career ladder); and changes the certification renewal process to require teachers with less than a master's degree to take only one college course over five years instead of two courses. Koella moved to restore the original language regarding course requirements, but Rucker (although he agreed with Koella) urged adoption of the package as a whole. The amendment passed unanimously.

In the Senate Finance Committee Cohen moved to reduce class size for first grade from 25 to 15 beginning in 1985-86. This is the same as a provision approved by the House Education Committee. After extended discussion about conflicting research on class size, the proposal failed 10-7. Darnell later offered an amendment to reduce class size in grades K-3 by an average of one student per class for each of the next five years. The amendment failed 9-8. (Aye: Cohen, Darnell, Ford, Hamilton, Hicks, Lewis, Ortwein and Wilder. No: Ashe, Atchley, Crouch, Dunavant, Garland, Henry, Koella,

Rucker and Thomas.)

Hamilton, addressing TEA's concerns for higher entry level salaries, moved to give a $500 supplement to apprentice teachers with one year of experience, $350 with two years of experience, and $200 with three years. (Hamilton had talked to the Governor last week about this.) The amendment passed 16-0.

The committee abruptly adjourned without passing the bill to allow members to work out their still obvious disagreement over class size. This issue generated considerable discussion; proponents argued that if the legislature was going to pass a $351 million tax package they would like to have some voice in how those funds were to be spent.

February 1. The Senate Finance Committee approved the education reform bill 12-5. Aye: Atchley-R, Crouch-D, Dunavant-R, Garland-R, Hamilton-D, Ashe-R*, Koella-R*, Richardson-D*, Thomas-D, Chairman Henry-D, Ford-D and Wilder-D. No: Darnell-D, Cohen-D*, Hicks-D*, Lewis-D* and Ortwein-D*. (New committee members are designated with an asterisk.)

The Senate Finance Committee passed 9-3-2 the one percent sales tax increase, effective April 1, 1984, which is expected to raise an additional $45 million during the remainder of this fiscal year and $281 million in 1984-85. The committee adopted an amendment by Hamilton providing that the increase continue only until July 1, 1985, thereby forcing consideration of tax reform next year. The Senate committee considered but did not approve amendments to exclude various items from the sales tax, such as food, residential utilities, and clothing. The committee voted down a proposal to remove the local option cap on the sales tax.

February 1. The House Finance Committee approved the education reform bill with the compromise amendment. The committee added a new provision, however, that would allow teachers to enter career level I after completing

satisfactorily a locally developed (and state approved and state monitored) staff development program, as an option to being evaluated or taking a test. The House committee also added an amendment by Chairman Bragg establishing legislative intent that certain goals be attained including: a 50% reduction in the number of teachers who leave teaching because of job dissatisfaction; a 20% decrease in high school drop out rate; elimination of waivers for teaching outside specialty area; a 10% decrease in percent of students failing the state proficiency test; an increase in ACT and SAT scores; and an increase in student achievement on basic skills tests. Also included were goals regarding higher education.

The House Finance Committee approved HB 7 increasing the sales tax by one percent and amended the bill by deleting the section that caps the local sales tax rate at 2.5%. The committee tabled an amendment by McKinney that would have removed the sales tax from food. Sales tax revenues from groceries were 17.61% of the total sales tax revenue of $1.171 billion last year. The committee approved various other bills to provide funding including HB 8 increasing the franchise tax (expected to yield an additional $40 million); HB 11 raising the premium tax on insurance ($7 million); HB 31 imposing a sales tax on amusements with K-12 sponsored events exempt ($20 million); HB 9 reducing the amount dealers may deduct for collecting the sales tax ($5 million); and HB 6 permitting appropriations from state revenues to exceed the estimated growth in the state's economy.

February 2. The House Finance Committee passed HB 14, the Education Appropriations Act which provides funding for the education program. The committee deleted $2.5 milion for a kindergarten program and added $40 million required to fund a 10% pay hike for teachers (a pay increase of only 7.5% had been in the original budget document).

The Senate Finance Committee passed each of the business taxes passed the day before by the House Finance Committee except that it held over until the following week the tax on amusements.

Week of February 6

Legislative momentum slowed this week when the Senate Finance Committee defeated 10-6 the amusement tax, causing the House to adjourn without considering the sales tax increase or education reform bill. However, the full Senate passed both bills.

February 6. The House Calendar and Rules Committee voted down the one-cent sales tax increase 14-16, thus dealing a temporary setback to the education measure that the tax would fund. Four members abstained, and six were absent.

The Senate passed unanimously the Education Governance Reform Act, which creates a new State Board of Education.

February 7. The House Calendar and Rules Committee reversed itself and passed the one-cent sales tax increase 19-12 and passed the education reform bill as well.

The full House passed tax bills increasing the franchise tax and the tax on property and casualty insurance premiums, a tax on amusements, and a bill to adjust compensation retailers receive for collecting the sales tax. Several amendments offered by Knoxville representatives to lessen the impact of the amusement tax on Knox County (which already has an amusement tax) were defeated.

At the same time, the Senate Finance Committee defeated the amusement tax 10-6 because of failure to agree on the issues of taxing Knox County and taxation of cable television. The House, angered by the Senate Finance Committee's action, adjourned abruptly without considering either the sales tax increase or the education reform bill.

February 8. An effort was made to gather the two-thirds majority in the Senate required to reconsider the amusement tax. When the effort failed, the House voted to adjourn until the following week. House members indicated they would not vote on the sales tax until Senators indicated they were ready to act on the education legislation and necessary funding.

Senate Democrats caucused during the morning and expressed their dissatisfaction with both education and tax bills; caucus chairman Ernest Crouch appointed five members—Joe Crockett, John Rucker, Carl Moore, Bill Ortwein, and Ed Davis—to a committee to draft an alternative to the administration-backed tax package.

The full Senate bagan debate on the education reform bill. Senate Democrats added an amendment sponsored by Darnell and providing for reduction in class size from 25 to 20 in grades kindergarten through third grade of one child per class for each of the next five years. The effect would be to hire 400 teachers next year at a combined state and local cost of $9 million. The bill's sponsors opposed the amendment because of cost and conflicting research findings on the efficacy of class size reduction. The amendment carried 19-14. Aye: Albright-R, Burks-D, Cohen-D, Crockett-D, Crouch-D, Darnell-D, Davis-D, Ford-D, Hamilton-D, Hicks-D, Kyle-D, Lashlee-D, Lewis-D, Moore-D, Ortwein-D, Richardson-D, Thomas-D, Williams-D, and Wilder-D. No: Ashe-R, Atchley-R, Burleson-R, Dunavant-R, Elkins-R, Garland-R, Henry-D, Koella-R, Longley-R, O'Brien-D, Person-R, Rochelle-D, Rucker-D, and Shockley-R.

February 9. The Senate passed the education reform bill 23-9-1, including the two major compromise packages recommended by the House and Senate Finance Committees, the class size amendment, and a modified version of the goals for education reform proposed by Rep. John Bragg. Aye: Albright-R, Ashe-R, Atchley-R, Crockett-D, Crouch-D, Darnell-D, Dunavant-R, Elkins-R, Ford-D, Garland-R, Hamilton-D, Henry-D, Hicks-D, Koella-R, Lewis-D, Longley-R, Moore-D, O'Brien-D,

Person-R, Richardson-D, Rucker-D, Shockley-R, and Wilder-D. No: Burks-D, Burleson-R, Cohen-D, Davis-D, Kyle-D, Lashlee-D, Ortwein-D, Rochelle-D, and Thomas-D. Absent: Williams-D.

The class size amendment probably picked up votes for the education reform bill of Democrats Crockett, Darnell, Ford, Hamilton, Hicks, and Lewis, but lost the votes of Burleson-R and Rochelle-D, both of whom were concerned about placing additional revenue burdens on local governments without giving them a means for raising revenues.

The Senate passed the one-cent sales tax increase 19-13-1. Hamilton amended the bill to make the increase temporary for 15 months (until July 1, 1985) in an effort to give a push for tax reform next session. Five of the Senators who voted for the education bill voted against the tax—Democrats Crockett, Ford, Hamilton, Hicks, and Lewis. Burleson-R, who voted against the education reform bill, voted for the sales tax.

Week of February 13

During the week, the House passed both the sales tax increase and the education reform bill. By the end of the week, sponsors were talking about ways to resolve substantial differences between House and Senate versions of the legislation.

February 13. The House approved 52-45-2 the one-cent increase in the sales tax after lengthy debate. Mike Murphy sponsored an amendment that would remove a third of the sales tax on food sold in groceries each year, beginning July 1, 1985, until it is all gone in 1987. Murphy suggested that this would make the sales tax less regressive, allow the legislature to plan in an orderly way for the phased reduction in revenues, and give impetus to tax reform next session. The amendment passed 83-9. The vote on the sales tax increase was as follows: Aye: Anderson-R, Atchley-R, Bewley-R, Bivens-D, Burnett-D, Byrd-D, Chiles-R, Ray Clark-R, Cobb-D,

Ray Davis-D, Drew-D, Duer-R, Elsea-R, Ford-R, Frensley-R, Gafford-D, Gill-D, Harrill-R, Hassell-R, Henry-R, Herndon-D, Hudson-R, Huskey-R, Kelley-R, Bob King-R, McNally-D, Miller-D, Montgomery-R, Moody-R, U.A. Moore-R, Dana Moore-D, Murphy-D, Nance-R, Owen-D, Percy-R, Pickering-D, Rhinehart-D, Robertson-R, Robb Robinson-D, Ruth Robinson-R, Scruggs-R, Severance-R, Smith-R, Stafford-R, Ussery-R, Webb-R, Whitson-R, Williams-R, Wolfe-R, Wood-R, Yelton-D, and McWherter-D. No: Bell-D, Brewer-D, Buck-D, Dick Clark-D, Copeland-R, Covington-D, Crain-D, Davidson-D, Lincoln Davis-D, Deberry-D, DePriest-D, Dills-D, Disspayne-D, Dixon-D, Ellis-D, Gaia-D, Hillis-D, Hurley-R, Jared-D, Johnson-D, Jones-D, Kent-R, Kernell-D, Alvin King-D, Kisber-B, Love-D, McAfee-R, McKinney-D, Murray-D, Naifeh-D, Napier-D, Phillips-D, C.B. Robinson-D, Shirley-D, Sir-D, Stallings-D, Starnes-D, Tanner-D, Brenda Turner-D, Chris Turner-D, Wallace-I, Wheeler-D, Withers-D, Wix-D, and Work-D. Present but not voting: Bragg-D. Not voting: Pruitt-D. Four Republicans voted against the tax: Copeland, Hurley, Kent, and McAfee. Bragg noted for the record that he was not willing to raise the sales tax without knowing whether the Senate would extend the sales tax to amusements.

The Senate passed a resolution by Garland and Henry calling for a study to be completed by February 1, 1985 of the relationship between pupil-teacher ratio in kindergarten and grades 1 - 3 and the child's subsequent educational progress in elementary and secondary school.

February 14. The Senate Finance Committee approved 13-3 the amusement tax, after amending the bill to exempt bingo (because of some Senators' concerns that taxing gambling legitimizes it) and to extend the tax to include college and university athletic events and premium cable television channels showing movies and sporting events. The original bill was estimated to raise $18 million in new state revenues and $6.5 million in local sales tax revenues. The extension to cable will raise an estimated $2.5 million for state government and $890,000 for

local governments. The bill passed despite heavy lobbying by movie, cable, and tourist industries.

The House passed the education reform bill 62-29-6. Rep. Cobb substituted SB-1 for the House version, and the House then amended the bill to incorporate key provisions of the House version.

The debate focused on the issue of reduction of class size, an objective strongly supported by the TEA. The Senate version included Darnell's amendment reducing class size in K - 3 by one each year for the next five years. Rep. Cobb moved to substitute his own amendment reducing the pupil-teacher ratio in the first grade to 15:1, beginning in 1985-86. His motion was tabled 53-40. Bivens moved to remove the Senate provision (Darnell amendment), saying that unless class size is below 15, there is little benefit. Bivens' amendment passed 47-44. Starnes then introduced another amendment, defeated earlier in the House Education Committee, which would have the same effect as the Darnell amendment—reducing class size by one each year for the next five years in K - 3. It passed 50-48. McKinney, who had been a consistent and vocal opponent of the education reform bill throughout the special session, amended the bill to prohibit the commissioner of education from granting waivers for classes exceeding maximum class size by ten percent—in effect, no more than two or three over the limits. This was felt by some representatives to be an alternative and less expensive method for dealing with the class size issue. Minority Leader Jim Henry then moved to delete the Starnes amendment, which called for decreasing class membership in grades K - 3 by one child per class each year for five years. The amendment passed 57-39 because of members' concern about the cost of class size reduction. In addition to deleting the Senate provision on class size, other House amendments provided the following:

1. (Work) LEA's have the option of applying funds allocated for teachers' aides for grades 1 - 3 to employ full-time teachers in those grades instead.

2. (Rhinehart) Teachers may enter the career ladder after participating in a locally-developed staff development program approved by the State Board of Education in addition to other methods. Teachers may use the National Teachers Examination taken within the last three years (with scores above the minimum to be adopted by the State Board of Education) to qualify for career level I.

3. (Bob King) Local school boards may hire as a probationary teacher a person who does not meet all qualifications for certification if there is a shortage of certified teachers or if the non-certified person has superior skills, qualifications and professional or advanced degrees.

4. (McKinney) Costs to local government mandated by the act shall be paid by the state, with the amount not specified. (House sponsors later agreed to withdraw this amendment after it was ruled unconstitutional as part of this legislation. However, the House appropriations bill, passed the following day, included an amendment having the same effect.)

5. (Cobb) The legislative oversight committee will monitor the implementation of the career ladder program as well as the expenditures necessitated by it.

6. (Cobb) Full incentive supplements will be paid to teachers with 11- and 12-month contracts. (The Senate amendment separating incentive supplements for outstanding performance from supplements for extra work for career levels II and III teachers with 11- and 12-month contracts was deleted.)

7. (Cobb) Local boards may designate the use of five days that the Senate had specified for "administrative functions."

8. (Bivens) The State Certification Commission's duties will not include the validation of procedures and instruments.

9. (Alvin King) In addition to the goals proposed by Bragg, the legislature intends that there shall be measurable improvement in the basic academic competencies, computer competency, and basic academic subjects as set out in Academic Preparation for College: What Students Need to Know and Be Able to Do, College Board, 1983.

The House vote on the education reform bill was 62-29-6. No. Bell-D, Buck-D, Dick Clark-D, Copeland-R, Crain-D, Davidson-D, Lincoln Davis-D, Dills-D, Disspayne-D, Dixon-D, Ellis-D, Jared-D, Johnson-D, Kernell-D, Kisber-D, Love-D, McKinney-D, Murray-D, Naifeh-D, Napier-D, Phillips-D, Shirley-D, Sir-D, Stallings-D, Tanner-D, Brenda Turner-D, Chris Turner-D, Wallace-I, Wheeler-D. Not voting: Bragg-D, DeBerry-D, Miller-D, C.B. Robinson-D, Starnes-D, and Withers-D.

February 15. The House passed 65-11 the education appropriations bill, delineating how revenues from various tax measures are to be spent. The bill provides $93 million for elementary and secondary education, and $50 million for teacher incentive supplements. Other funds are allocated for higher education programs and for an average pay increase of ten percent for state employees, public school teachers, and higher education employees.

February 16. With most of the legislation having passed both the Senate and House, the process of reconciling the differences began. Most of the compromising occurred in informal discussions among the legislation's sponsors; no formal conference committees were utilized.

The Senate voted to accept the House tax provision that will remove the state sales tax from food in three phases. The House provision allowing local governments to raise local option sales taxes will be removed from the tax bill because it is constitutionally suspect (because the bill's caption explicitly prohibits an increase in the local sales tax). Some sponsors of the provision promised to bring it up in the regular legislative session, however.

Most Senate sponsors of the education reform bill noted their willingness to accept most provisions in the House version of the bill, including deletion of class size reduction. However, the Senate, which had scheduled a vote on the bill, decided to postpone action until the following week to allow Senators Darnell, Hamilton, and other supporters of class size reduction to consider their options.

The week ended with apparent agreement on the education reform bill, agreement on the sales tax increase, and with passage of all other tax measures except the amusement tax.

Week of February 20

During the final week of the special session, the House and Senate worked out their differences regarding education and tax measures, and passed a $401 million appropriations bill to fund education programs and salary increases.

February 20. The Senate passed the amusement tax 22-11 after considering but not acting on an amendment to delay implementation of the bill for seven months.

The Senate accepted most House amendments to the education reform bill. The Senate acquiesced in House action deleting provisions to reduce class size and restored a provision for hiring teacher aides in grades one through three over a three-year period (the provision was inadvertently deleted by the House). Thus, the class size issue was resolved by providing teacher aides in the early grades (the state funding for which could also be used to hire full-time teachers) and by the McKinney amendment prohibiting waivers for classes exceeding the limit by more than ten percent. However, the Senate did not agree to allow school boards to hire experts in particular fields as teachers if they were not certified. This issue, which passed the House with little debate, received considerable debate in the Senate, and House sponsor Bob King indicated he would raise it

again in the regular session. Additionally, the Senate insisted on retaining the provision separating the portion of the incentive supplement granted for extra work for career level II and III teachers; thus, teachers would not receive the full supplement if the local school board had no additional work for them.

February 21. The Senate Finance Committee amended the education appropriations bill to provide for the state to pay for certain specified costs incurred by local governments in implementing the better schools program (rather than an unspecified amount as in the House version). The state will pay local governments $4.1 million for expenses incurred in extending the school year from 175 to 180 instructional days; $1 million to hire additional math and science teachers; and an unspecified amount to local governments for the installation, maintenance, and operation of equipment purchased for the Basic Skills First and Computer Skills Next programs (this amount could be as high as $5.7 million). The state will also pay $6.5 million for hiring teacher aides, and an additional $40.4 million to increase the salary raise for teachers, higher education and state employees from 7.5 to 10 percent.

February 22. The Senate and House gave final approval to the education reform, sales tax increase, and amusement tax bills and sent them to the governor for signature. The Senate approved the education appropriations bill with amendments approved by the Senate Finance Committee.

February 23. The two houses concurred on the appropriations bill, and the special session was adjourned.

Major issues affected by the legislative package include:

—Governance. A restructured State Board of Education will provide planning and policy-making for public education, and a State Certification Commission and Regional Certification Commissions will implement the career ladder subject to approval by the state board.

—Career ladder and teacher evaluation. A five-step career ladder—probationary, apprentice, and career levels I, II, and III—for teachers and comparable ladders for principals, assistant principals, and supervisors will offer incentive pay supplements and opportunities to assume new duties. Evaluation of teachers will be done locally at the first three levels in accordance with state guidelines and by the state at the top two levels. An estimated 32,000 of the state's current 46,000 teachers will be able to enter the career ladder by a variety of options including testing, evaluation, and staff development.

—Protection of rights of current teachers. While all new teachers will be in the career ladder, all current teachers may choose to participate or not. Current teachers may try the new system, but if they don't like it they may revert their current certification; they may exercise this option one time during their careers. Teachers rights under current tenure and collective bargaining laws are protected, but the career ladder is not subject to collective bargaining. The law provides for recertification of career teachers every five years, but current teachers may avoid this provision if they opt not to remain in the career ladder. New teachers who finish their probationary year and apprentice period (three years) and who are denied entry to career level I can continue to be employed at the local level (but without state funds) and they may begin again as a probationary teacher in another school system. Certification decisions will be made by the state, and tenure decisions will be made by local school boards as under current law.

—Teacher compensation. Teachers will receive across-the-board increases in state funds of ten percent. Additional incentive supplements will be paid by the state to teachers above the probationary level. Teachers will receive the following supplements: apprentice ($500), career level I ($1,000), career level II ($2,000 and $4,000 with 10- and 11-month contracts), and career level III

($3,000, $5,000, and $7,000 with 10-, 11-, and 12-month contracts). Teachers having 11- and 12-month contracts will not receive the portion of the supplement allocated for extra work if the local board does not provide them with work during the extra months.

—Class size. The state will pay for teacher aides for grades 1 - 3. Local school districts may use the funds to hire full-time teachers for these grades. The Commissioner of Education may not grant waivers for classrooms exceeding maximum class size by more than ten percent—in most cases two or three children.

—Financing. The plan is funded by a one-cent increase in the state sales tax (the local option sales tax may not be increased, however), an extension of the sales tax to amusements, and various business taxes. The sales tax increase is temporary, expiring July 1, 1985, and the state sales tax on food (but not the local sales tax on food) will be removed over three years beginning July 1, 1985. These measures were intended to force the legislature and governor to deal with the issue of tax reform next year.

—Local government costs. The state will pay for costs incurred by local governments to extend the school year, hire additional math and science teachers and install and maintain computer equipment. In addition to paying incentive supplements, the state will provide a ten percent average salary increase for the state portion of regular salaries. (Local governments are required to maintain their current salary supplements, and some may be required by collective bargaining agreements to provide a comparable ten percent increase for the local salary supplement).

APPENDIX D

HIGHLIGHTS OF STATE ACTIONS

CAREER LADDER CLEARINGHOUSE

NEWS FROM THE STATES

April 1985

States Implement Incentive Programs

Utah Expands Career Ladder Program

The Utah legislature has doubled funding for career ladders from $18 million for the current year to $36 million for next year--roughly $2,000 per teacher. All 40 local districts and 6 special local education agencies have elected to participate. Funds go directly to the districts, which may allocate up to 50 percent of the funds for an extended contract year, with the remainder going for career ladder advancement.

An analysis of local plans undertaken by the University of Utah and the State Office of Education indicates that during the first year most districts have extended their contracts by several days to allow for planning, in-service, and parent conferences.

The career ladder advancement provisions, which provide for salary and status elevation of selected teachers, have encouraged innovation in evaluation. To date, 67 percent of the districts have revised their evaluation practices. Most now use evaluation committees (including peers) and evaluation data from administrator rating forms that consider student progress and other items. Teachers who have been promoted on the career ladder are now redesigning the curriculum, helping new teachers, and developing instructional packages.

For information, contact: Michael J. Garbett, Utah State Office of Education, 250 East 500 South, Salt Lake City, UT 84111

Tennessee Implements Career Ladder for Administrators and Special Groups

About 750 administrators have applied for evaluation under the state administrator/supervisor career ladder plan. The evaluation system assesses competencies such as instructional leadership, organizational management, communication and interpersonal relations, and professional growth and leadership.

Fifteen administrators, who are on leave from their local school systems for the year, are serving as evaluators. They conducted a field test of the system in the fall and in February began evaluating principals, assistant principals, and instructional supervisors who have applied for the career ladder. These evaluators will interview candidates, rate portfolios,

For additional information contact:

Karen Weeks
Vanderbilt Institute for Public Policy Studies
1208 Eighteenth Avenue South
Nashville, TN 37212 (615) 322-8513

Lynn Cornett
Southern Regional Education Board
1340 Spring Street, N.W.
Atlanta, GA 30309 (404) 875-9211

conduct observations, and administer questionnaires to peers, professional staff, supervisors and students. A professional skills test will also be used for evaluation purposes.

In the teacher career ladder program, the first group of Career Level II and III teachers will be identified in June. Fifteen Career Level III teachers will serve on the new Regional and State Certification commissions, and others may apply to become teacher evaluators for next year. Career Level II administrators identified in June will also be appointed to serve on the commissions.

Evaluation systems for special educators and vocational educators are being field tested this spring. Competencies and evaluation systems are also being developed for special groups, such as librarians, counselors, school psychologists, school social workers, attendance workers, audiologists, and speech and language specialists/pathologists for field testing.

For information, contact: Karen Weeks, Vanderbilt Institute for Public Policy Studies, 1208 Eighteenth Avenue South, Nashville, TN 37212

Florida Implements Master Teacher Program

In Florida 32,000 teachers have taken subject area tests to be eligible for the new Master Teacher Program. The constitutionality of the program was recently upheld in a circuit court ruling which stated the plan does not bypass the local collective bargaining process. In June of this year as many 6,300 teachers will be named associate master teacher and receive a $3,000 supplement ($1,500 to be paid in June, $1,500 in September). Teachers scoring in the top quartile on both the Florida Performance Measurement System and subject matter tests will be eligible.

Florida is one of the first states to test subject matter knowledge at the upper levels of a career ladder. About 80 percent of the teachers are covered by one of 5 NTE or 13 Florida subject area tests. Those in subject areas for which there is no test must have a master's degree in their subject area to qualify for associate master teacher.

For information, contact: Garfield Wilson, Director, Teacher Education and Certification, Florida Department of Education, Knott Building, Tallahassee, FL 32301

Maine Pilots Three-Step Certification Plan

A teacher certification law, enacted in April 1984, establishes three levels of certification--provisional, professional, and master teacher. The concept is being piloted for two years in 13 local sites; 7 additional sites are participating without state funding. Beginning teachers serve a two-year provisional term, during which their progress is supervised and evaluated by a support system consisting of a majority of teachers. After successfully completing the provisional term, teachers will be granted a five-year professional certificate that is renewable.

Professional teachers may apply for a master teacher certificate. In the piloting sites, candidates for temporary master teacher certificates must demonstrate to a local support team exemplary professional skills in classroom teaching and knowledge of subject matter, as defined locally. The award of extra pay is to be determined by the local district. An advisory committee will monitor the program and make final recommendations to the legislature in 1988.

For information, contact: Gloria LaChance, Coordinator, Teacher Career Development, Maine Department of Educational and Cultural Services. State House Station 23, Augusta, ME 04333

Texas Implements Career Ladder While Legislature "Fine Tunes" Provisions

Texas is moving to implement its four-step career ladder, adopted in a special legislative session last year. Experienced teachers qualified for level 1 in September 1984. By the end of the current school year, many teachers will be eligible to move to level 2 following evaluations conducted by the school districts using existing local evaluation procedures.

The Texas Education Agency is developing a statewide evaluation system for the plan to be used beginning in 1986. The agency will train 11,000 evaluators needed to conduct evaluations of 200,000 teachers.

A bill introduced in the Texas Senate to "fine tune" the earlier legislation expands the definition of teacher to include certified non-degree teachers (such as vocational teachers) and librarians. The evaluation process calls for two appraisers--the teacher's supervisor and another approved person who may be a teacher. According to the new legislation a teacher may not appraise the performance of another teacher at the same campus unless the evaluating teacher is the head of a department or is grade level chairman. The original plan ties teaching certificates to career ladder levels. This bill calls for "endorsements" to be added to a teacher's certificate for each career ladder level.

For information, contact: Susan Barnes, Texas Education Agency, 201 E. 11th Street, Austin, TX 78701

Legislation Establishes Career Ladder Programs

Georgia To Develop Career Ladder

The Georgia legislature recently passed an Education Reform Bill which directs the State Board of Education to appoint a Task Force, representing all educational interests, to develop by July 1986 and then implement a career ladder program for teachers. The career ladder has as its purpose "providing classroom teachers who demonstrate above average or outstanding competencies relative to teaching skills and their teaching field and exhibit above average classroom performance, which may include the achievement of students beyond the level typically expected for their ability, with salary supplements...."

The legislation also provides for an 11 percent salary increase for all teachers. Beginning teachers would make $16,000, a figure roughly comparable on an annualized basis to salaries of other graduates of Georgia's university system.

For information, contact: William Leach, Director of Staff Development, Georgia Department of Education, Twin Towers East, Atlanta, GA 30334

Alabama Adopts Career Incentive Plan

The Alabama legislature has approved an incentive-based pay plan for teachers "to provide career incentives for public school teachers while initiating a program of performance appraisal...."

A 35-member working committee will devise the appraisal program for the plan--15 members will be appointed by the Alabama Education Association, 15 by the State Superintendent of Education, and 5 (3 of whom must be teachers) by the governor. A larger Appraisal Review Committee, consisting of two teachers and the superintendent from each of the state's school districts, will also be involved with the working committee.

The plan will be phased in over a five-year period, beginning in the first year with the development of job descriptions, appraisal instruments, and evaluator training. The various levels of the ladder--intern, probationary, professional I, professional II, and master teacher--will be phased in; selection of master teachers is slated for 1989-90.

An appraisal instrument will identify strengths and weaknesses and will include the following criteria: planning, classroom management, competence in subject matter, professional growth and development, communication skills, and student achievement. The school principal will have primary responsibility for the evaluations. State salary supplements will maintain intervals of $5,000 between professional I and II and $6,000 between professional II and master teacher.

For information, contact: Allen D. Cleveland, Alabama State Department of Education, Montgomery, AL 36130

Arkansas Legislature Establishes Teacher Career Development Program

Legislation in Arkansas calls for Governor Bill Clinton to appoint a seven-member Teacher Career Development Commission to set guidelines to establish pilot career ladder programs in six Arkansas school districts during the 1985-86 school year. The Commission will receive proposals from interested school districts. Teachers and parents are to be involved in the development of district proposals. If less than 30% of the teachers in a district indicate an interest in the program, the district cannot submit a proposal. One-half million dollars is set aside for the program. After two years the Commission will make recommendations to the State Board of Education concerning the feasibility of establishing a statewide plan.

For information, contact: Don Ernst, Office of the Governor, State Capitol, Little Rock, AR 72201

Work Continues On Career Ladder Plans

Kentucky Panel Adopts Guidelines For Career Ladder

A state committee, appointed by Governor Martha Layne Collins (according to 1984 legislation), has adopted 14 guidelines that it will use to develop a teacher career ladder. After surveying teachers, administrators, school board members, and parents, the committee's guidelines call for differentiated salaries at various steps on the ladder without regard to caps or quotas, continuous evaluation of teacher performance as indicated by multiple sources of data, and trained evaluators. The plan should not be an alternative for adequate base pay according to the guidelines. Three subcommittees are working out details in order to complete a final proposal in June. The plan will be submitted to the legislature for approval in 1986.

In addition to career ladder planning, Kentucky is already developing a program for new teachers requiring them to complete a one-year internship with support and evaluation by a three-member committee. This program could become part of a new career ladder.

For information, contact: Rita Lindsay, Kentucky Department of Education, Division of School Improvement, Capitol Plaza Tower, 17th Floor, Frankfort, KY 40601

Plan For Career Ladders Submitted To Delaware Legislature

Legislators in Delaware are reviewing a plan for career ladders developed by a consulting firm and have asked the firm to provide additional details. The plan combines many features of other statewide plans while allowing considerable input at the local school district level for selection of teachers. The proposed career ladder has four levels--Apprentice and Career Levels I, II, and III--and provides for substantial base salary increases as well as performance-based increments. Average salaries for the state's 5500 teachers in 1985-86 would range from $16,200 at the entry level to a maximum of $36,400 at Career Level III.

Candidates for the career ladder would be evaluated by both a building administrator and a state-appointed evaluator (a Career Level III teacher from another district). In each of Delaware's 10 school districts a committee would review the evaluators' recommendations and supporting materials and submit recommendations to the superintendent.

The numbers of teachers selected for Career Levels II and III would be based on clearly defined selection standards, rather than predetermined quotas. The plan is projected to cost $4 million the first year, an amount similar to that requested

for career ladders by Governor Mike Castle. The plan is to be phased in over a five-year period, with costs for base salary increases and performance increments estimated to be $21 million per year at the end of a 10-year period.

For information, contact: Ervin C. Marsh, Supervisor, Certification and Personnel, Department of Public Instruction, Dover, DE 19903

Washington Legislature Considers Career Ladder Pilot Plan

A citizens committee, the Temporary Committee on Educational Policies, Structure, and Management, and a business group, the Washington Roundtable, have both called for the development of career ladders for teachers. The Senate considered a statewide plan as recommended by the two groups, but with reduced projections of revenue, the Senate adopted instead a scaled-down plan calling for $1 million for 10 local pilot projects. The legislation, which has not yet been approved by the House, would provide for local districts to submit proposals for career ladder plans that would include criteria for movement on the ladder, means for evaluating teacher performance, and differentiated responsibilities and salaries. Local school boards and employee organizations would have to agree to the plans before submitting them to the Department of Public Instruction. A commission would evaluate the two-year pilot and submit a report to the governor and legislature by January 1988.

For information, contact: Judy Hartmann, Department of Public Instruction, Old Capitol Building, Olympia, WA 98504

Oklahoma Legislature Considers Incentive Program

The Education Improvement Act of 1985, recently introduced in the Oklahoma legislature, includes a Teacher Career Incentive Program. Advancement from professional to senior and master teacher levels depends on achieving staff development points in the area of teaching, higher education coursework, and performance evaluations.

The State Board of Education is to adopt standards, evaluation instruments and criteria for implementation. Local staff and professional development committees will appoint evaluation teams (a teacher and an administrator from the teacher's building) and make recommendations to the State Board concerning the selection of teachers. The local committees will consider student performance and will assess the applicant's rapport and communication skills. Input from the applicant's peers will also be included at the master level.

In addition to the teacher incentive plan, the bill provides salary increases for all teachers. The plan would go into effect for the 1986-87 school year.

For information, contact: Debbie Turlip, House Education Committee, State Capitol Building, Oklahoma City, OK 73101

APPENDIX E

LIST OF THE 18 DISTRICTS

List of the 18 Districts

Tennessee's Department of Education utilizes 18 administrative districts in categorizing service areas. The Teachers' Study Council organization utilizes these district divisions as well. They are, along with representation in the survey responses, as follows:

1.	First Tennessee-Council 1	63
2.	First Tennessee-Council 2	80
3.	East Tennessee-Council 1	92
4.	East Tennessee-Council 2	41
5.	East Tennessee-Council 3	77
6.	East Tennessee-Council 4	30
7.	Southeast District-Council 1	51
8.	Southeast District Council 2	55
9.	Upper Cumberland	23
10.	Mid-Cumberland-Council 1	21
11.	Mid-Cumberland Council 2	98
12.	Metro Council	96
13.	South Central-Council 1	31
14.	South Central Council 2	57
15.	Northwest District	56
16.	Southwest District	51
17.	Memphis Delta-Council 1	73
18.	Memphis Delta-Council 2	44

APPENDIX F

STATEWIDE CAREER LADDER RESULTS

Statewide Career Ladder Results

As reported to the media* on June 27, 1985, the following figures applied to the 1984-85 Tennessee Career Ladder for teachers:

Number who applied for Level I: 37,063

Number eligible for upper levels (II or III): 24,342

Number applying for upper levels (II or III): 9, 406

Number evaluated during 1984-85: 3,120

Number attaining Level II status: 458

Number attaining Level III status: 632

*These figures were released by Deputy Education Commissioner Beecher Clapp on June 27, 1985.